



Homes  
England

The Housing and Regeneration Agency

Date: 17 July 2025

Our Ref: RFI5101

Email: [infogov@homesengland.gov.uk](mailto:infogov@homesengland.gov.uk)

[REDACTED]  
By Email Only

Dear [REDACTED]

**RE: Request for Information – RFI5101**

Thank you for your request for information which was processed in accordance with the Freedom of Information Act 2000 (FOIA). Please accept our apologies for the delay in providing this response to you, we recognise that our handling of your request has fallen outside the time for compliance as set out in the FOIA.

You requested the following information:

**I see that Homes England commissioned accountancy firm KPMG to carry out an assurance review of its Evolve programme in March 2024 and that this contract was due to complete in October,**

**<https://procontract.due-north.com/ContractsRegister/ViewContractDetails?contractId=3bbfa307-efda-ee11-8127-005056b64545>**

**Can you send me a copy of this review report please?**

**Response**

We can confirm that we do hold the requested information. Homes England sought an external independent review of its Evolve Programme. The external review produced two reports, the first issued in May 2024 containing the independent reviewer's findings and the second, issued in September 2024, containing an update on the original report following a further review.

Please find enclosed with this response Annex A containing a copy of the reports.

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We have redacted some information within Annex A on the grounds that it constitutes third party personal data and therefore engages section 40(2) of the FOIA.

## **Section 40 – Personal information**

To disclose personal data, such as names, job titles and contact details could lead to the identification of third parties and would breach one or more of the data protection principles.

Section 40 is an absolute exemption which means that we do not need to consider the public interest in disclosure. Once it is established that the information is personal data of a third party and release would breach one or more of the data protection principles, then the exemption is engaged.

The full text in the legislation can be found on the following link:

<https://www.legislation.gov.uk/ukpga/2000/36/section/40>

## **Advice and Assistance**

We have a duty to provide advice and assistance in accordance with Section 16 of the FOIA. To comply with this duty, we are able to confirm the Evolve Programme was commissioned to help modernise Homes England's digital services, solutions and tools for our customers, partners and colleagues.

Evolve delivered several products but fell significantly short of achieving the ambition to fully modernise Agency systems, a source of deep regret that we are taking all steps to learn from.

We have taken action, underpinned by independent scrutiny, including closing Evolve as a stand-alone programme, maximising created assets, and ensuring all lessons are learned and embedded in ways of working to prevent the mistakes that were clearly made from happening again.

Evolve was commissioned in 2019 and closed by the Agency in 2025. The products it successfully created are now part of organisational operations, while many of its other activities have laid solid foundations for continued transformation of Agency systems. These products include a new data platform, data analytics capabilities, operational planning tools and cloud infrastructure.

In 2024, Evolve was moved under a new Senior Responsible Officer (SRO), who immediately commissioned an independent assessment of the programme, which reported back in May 2024. The report identified very significant issues and a progress report in September 2024 concluded that, while some improvements





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were evident, substantial challenges remained and Evolve should be integrated into a single cross-organisational programme.

Evolve assets are now part of a single integrated programme for the Agency as a whole with responsibility for data, digital and the business target operating model. Important lessons learned from Evolve, including actions around governance, management and business-led collaboration, are reflected in new ways of working.

## **Right to Appeal**

If you are not happy with the information that has been provided or the way in which your request has been handled, you may request an internal review. You can request an internal review by writing to Homes England via the details below, quoting the reference number at the top of this letter.

Email: [infogov@homesengland.gov.uk](mailto:infogov@homesengland.gov.uk)

Information Governance Team  
Homes England  
The Lumen  
2<sup>nd</sup> Floor  
St James Boulevard  
Newcastle Helix  
Newcastle upon Tyne  
NE4 5BZ  
United Kingdom

Your request for review must be made in writing, explain why you wish to appeal, and be received within 40 working days of the date of this response. Failure to meet this criteria may lead to your request being refused.

Upon receipt, your request for review will be passed to an independent party not involved in your original request. We aim to issue a response within 20 working days.

You may also complain to the Information Commissioner's Office (ICO) however, the Information Commissioner does usually expect the internal review procedure to be exhausted in the first instance.

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The Information Commissioner's details can be found via the following link:

<https://ico.org.uk/>

Please note that the contents of your request and this response are also subject to the Freedom of Information Act 2000. Homes England may be required to disclose your request and our response accordingly.

Yours sincerely,

**The Information Governance Team**  
For Homes England

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# **Presentation of Findings Report**

Version : V1.0 Final

May 2024

# Contents

Homes England Presentation of Findings .....	3
1. Executive Summary .....	3
2. Your Ask .....	4
3. Approach We Took .....	4
4. High-level Findings, Impact and Conclusion.....	6
4.1. Summary of Findings and Recommendations.....	6
4.2. Baselineing the Core Understanding of Senior Stakeholders .....	10
4.3. Detailed Findings .....	11
4.3.1. Customer & Scope.....	11
4.3.2. Planning & Scheduling.....	13
4.3.3. Solution & Release .....	14
4.3.4. Risk Management.....	15
4.3.5. Capability and Culture.....	15
4.3.6. Commercial & Procurement .....	17
4.3.7. Finance.....	18
4.3.8. Performance .....	19
4.3.9. Governance .....	19
4.4. Action Plan .....	22
4.5. Appendix A: Interview Schedule.....	31
4.6. Appendix B: List of Materials Received and Reviewed.....	32
4.7. Appendix C: List of Areas to Cover based on Initial Request .....	38
4.8. Appendix D - Interview and Document Playback.....	39
4.9. Appendix E - Action Plan Mapped to Areas of Focus .....	41

# Homes England Presentation of Findings

## 1. Executive Summary

This report has been compiled at the request of Homes England to provide the new SRO with a baseline of the current state of the programme in accordance with a specification shared in February 2024. The key ask, was to help Homes England understand whether the Evolve programme was setup for success to deliver a scope that would best enable the ambition of the business case to be realised..

The review was conducted in March 2024, and as the review progressed, KPMG distilled, in conjunction with Homes England input, the review to answer two “exam” questions:

- 1) For the time and budget remaining does the scope give Homes England best value and achieve as close to the business case as possible.

AND

- 2) Against the scope, time and budget defined, is Homes England set up for success to deliver this and therefore achieve the value identified.

In summary, the answer to both questions was no. We (KPMG) did not find a defined, agreed scope with a corresponding time and budget profile. We also did not find that the programme structures, culture and ways of working were setup for success, even if a fully budgeted plan with detailed scope and associated activity and resource plans had been in place.

We assessed the programme's likelihood of success, the relative strength against agreed criteria, and the potential risks associated with individual projects. Our findings indicate that the programme faces significant challenges, including a lack of shared ownership, unclear resource allocation, and concerns about the business case.

This review revealed a critical gap in understanding the impact and consequences of Release 1.0 at both senior stakeholder, and wider business levels. Digital and data leaders expressed concerns about their understanding of Release 1.0 content and their ability to support its implementation and future releases. This lack of clarity, as highlighted in our findings, poses a significant risk to the programme's success.

Based on our assessment, we conclude that proceeding beyond Release 1.0 without addressing these fundamental issues is highly inadvisable. The potential consequences of missed deliveries, unintegrated solutions, untracked costs, and missed value far outweigh the short-term pain of a replanning process.

We strongly recommend establishing a dual-run team to handle both Release 1.0 delivery and its subsequent support phase, alongside a parallel replanning activity. This approach will ensure continuity while allowing for a comprehensive review and realignment of the programme's goals, objectives, and deliverables. Additionally, a programme culture reboot and the launch of a refreshed vision are essential to foster stakeholder engagement and ownership.

We have grouped the recommendations into 4 key areas:

- Governance

- Planning
- Engagement and Culture
- Programme Ways of Working

Implementing these recommendations rapidly is crucial in mitigating the identified risks and putting the Evolve programme on a path to success. In taking decisive action and embracing a more connected approach, Homes England can achieve the programme's intended value and deliver tangible benefits for the organisation.

## 2. Your Ask

The report should provide a set of recommendations and timebound actions for implementation that are required to improve the confidence rating of the programme. It should enable us to understand:

- The overall likelihood of success or failure.
- The relative strength of each of the criteria, drawing attention to those areas that need most attention.
- Which projects are at greatest risk of failing.
- Which projects are weaker than others, drawing attention to those projects that need most attention.

At its heart, the “exam questions” you posed were:

1. For the time and budget remaining, are we undertaking a scope that will give Homes England best value and achieve as close to the business case as possible,  
AND
2. Against the scope, time and budget defined are we set up for success to deliver this and therefore achieve the value identified?

## 3. Approach We Took

The findings and recommendations were conducted based on the interview schedule and documents reviewed as detailed in the appendix. Our work was limited to what we saw and heard during the assessment, and we were unable to follow every lead due to time and resource constraints. We asked a set of consistent questions to frame each interview to ensure a thorough understanding of the programme and its various aspects.

### Outline of the approach:

- **Stakeholder Interviews:** Interviews conducted with Homes England identified key stakeholders to understand their perspectives on the programme's scope, deliverables, benefits, challenges, and reasons for its perceived challenges.
- **Documentation Review:** Reviewed the documentation provided to gain insights into objectives, milestones, timelines, dependencies, and expected outcomes. Identified gaps, inconsistencies, and deviations from original plans.
- **Analysis:** Analysed interview and document data to identify common themes, patterns, pain points, and potential root causes of programme challenges.

### Evidence:

- Interview transcripts and notes



- List of reviewed documentation (Detailed in Appendix B)

**Limitations:**

- Time and resource constraints limited the scope of the assessment.
- Findings based on information available at the time of the assessment.
- The review was unable to pass any specific comment on Release 1.0. Colleagues in the review were still working on the business impact, other colleagues were not confident they understood the scope. However, this in of itself is a significant finding.

By following this approach, to effectively gather information, analyse stakeholder perspectives, and identify areas where support is needed, we believe this report will help the Evolve programme achieve its objectives.

## 4. High-level Findings, Impact and Conclusion

### 4.1. Summary of Findings and Recommendations

#### Summary of Key Findings

We have grouped the key findings into three areas:

- **Governance**
  - There have been limited, if any, formal governance meetings taking place outside of Change Committee. This committee is too high level to grapple with the challenges and to explore and discuss the risks, issues, dependencies and assumptions appropriately.
  - The programme leadership was not sufficiently accountable to the business.
  - There was a lot of uncertainty as to what the scope of Release 1.0 was, the impact of it in the business, and who would be managing the business and technical support for it post go live.
  - There was little to no confidence in the business case or the plan to achieve all, or some of it.
  - There was no evidence that change control procedures were working well, and that the necessary artefacts to support impact assessment existed.
  - The programme and involved groups such as Digital, Data were not able to provide confidence to the SRO that the programme is progressing in a planned, agreed and safe manner. We saw no evidence to support a different conclusion.
- **Engagement**
  - The programme does not have any readily available mechanism to understand how colleagues are feeling regarding either the programme, or in the wider business about the work to date or the plan moving forward.
  - Colleagues did not believe that the programme scope was achievable and there were significant differences of opinion as to what that scope was.
  - The feedback from the baseline questions showed that Directors and Executive Directors were not aligned.
  - There was no evidence of any integrated programme view of the business impact of the programme plan and the consequences for business areas, performance and colleagues.
  - There is not a coherent set of artefacts covering scope, plan, benefits, finances, resources and business impact that all stakeholders can align on and commit to.
- **Programme**
  - There appeared to be lack of coherent commercial and supplier management activity, at least in part, due to the lack of clarity from the programme and business as usual (BAU) teams as to their needs.
  - The finance and risk perspective on the programme is detached, and not integrated into decision making.

- There is disconnect between the business, Data and Digital and the programme. This has resulted in resource shortages, delays in the programme, and potentially an assurance gap from receiving teams.
- The programme is struggling to make the transition from individual project items to an integrated programme plan despite this having been a long-standing action.
- The approach to design is fragmented across business units and between different workstreams. This is leading to a lack of an integrated understanding of the design needed to deliver new ways of working.
- The programme does not have anchor artefacts that it can track, monitor and reevaluate through the delivery journey.
- It is unclear how people's time is being focused on activities that contribute effectively towards the work for the remaining year. Given pressures on people and morale, potentially stopping or pausing some work whilst clarity is sought could provide some short-term relief, save some money and allow a refocused effort to begin later.
- Architects from across the business and suppliers did not appear to understand the macro journey of Evolve. Without this shared understanding disparate activities in BAU, other programmes and within Evolve will diverge and lead to a mix of standards and potentially bigger issues resulting in time and cost impact to customers and colleagues. An example of this would be different user interface standards resulting in different user experiences depending on which supplier/which project delivered the user experience. This would in turn potentially lead to BAU needing to support different "builds" which may make problem resolution and improvement more complex and also mean additional skills/capabilities are needed beyond what could have been required.
- The programme has suffered periods of uncertainty, adjustment and confusion following Department of Levelling Up, Housing and Communities (DLUHC) funding allocations. This has hampered engagement, communication, planning and programme delivery.
- It is clear that many of the "right" things have been requested by the SRO, but it seems to be taking a long time to produce, and it is unclear where these artefacts are going and when they are landing. It can be seen that colleagues did not have a sense of priority and that programme leadership is not effectively supporting direction. This also supports the finding that the foundational artefacts are not in place. If they were in place the time to produce revised artefacts would be shorter.

## Summary of Key Recommendations

We have similarly grouped the key recommendations into four areas, the three finding areas and a fourth "replan".

- **Governance**

- The SRO needs to identify the key individuals from the business who should be brought into the tent in terms of soft and formal communications and governance. A Service Director community needs to be built where ongoing programme to business dialogue, information sharing, RAID discussion and

leaning in becomes the norm. This sits outside the programme board governance.

- A new way of framing accountability, objectives is needed to align all senior colleagues.
- Change control/scope control needs to be put in place both in Evolve but also across any related Digital, Data change plans/activity plans for the financial year FY24/25. Ideally, a Homes England Business Design Authority and Technical Design Authority would be made more active/established.
- Formalise a Stage gate assurance process and consider the possibility of ongoing independent reviews/support for the SRO and programme board

- **Engagement**

- A regular survey of the colleagues interviewed and then a fuller survey of programme and business colleagues are needed to check communications, and clarity on roles and responsibilities, scope and understanding is improving.
- Senior executives, not just the SRO, need to relaunch/reboot the programme in a visible way once a replan is completed. The intention would be to share the remaining scope, and to instil a belief in key colleagues on the programme and with colleagues who are key to the programme from the business.
- A joint playback to Executives by the business leaders/SRO and programme leadership should be undertaken and then regularly repeated. This should be supported by the same playback occurring at programme boards first.

- **Programme**

- Without any key anchor artefacts in place the Commercial/Supplier arrangements need a step back. This is across the programme and Digital and Data. Homes England needs to be assured to proceed having defined Delivery Partner scope requirements, internal skills and capability to support the programme and then the balance requiring contingent labour or delivery partner resource. The end-state requirements/or principles that will guide procurement of Managed Service arrangements need to be outlined. Once the scope is understood, and these are documented for shared clarity, a review of the commercial approach should be undertaken.
- The finance and risk business partner modelling needs review as to how these inputs work into the programme and how visibility of their work and the actions arising are managed.
- All business areas need to commit to an expectation of business impact and resourcing to support Evolve, and confirm the priority requirements to deliver. In the case of Digital and Data, there needs to be a special focus on their responsibilities to support the programme, including what they want to do and what they need to do – design/assure architecture and how service transition and ongoing delivery will be managed post go live.
- There remains a very strong project/pillar perspective. The pivot now to programme is very late. People don't understand the change in thinking needed. This needs a cultural and leadership thinking reboot within the programme.

- **Replan**

- The programme needs a replan phase for beyond Release 1.0 that brings together senior programme leaders and directors in the business areas impacted to produce key programme artefacts to be able to answer the Exam Questions listed in Section 1 of the document.
- A plan for the replan needs to be drawn up to ensure the question of whether projects, suppliers and Homes England colleagues are working on valid activity that will be valuable irrespective of the outcomes of a replan. (Note: action 1 focuses on the content of the replanning effort, aiming to produce specific programme artifacts that address the Exam Questions. Action 3 focuses on the process of replanning, ensuring that ongoing work remains valuable even if the programme undergoes significant changes).
- As part of the replan process, the key suppliers, Digital, Data and programme architects need to be brought together to find a way to deliver the optimal value path.
- An integrated service design approach needs to be agreed as part of the core programme activity moving forward.
- It should be determined how end-to-end business process design will be undertaken, and then how a business process catalogue is constructed and maintained as a key programme artefact.
- The programme needs a set of key artefacts to be able to communicate understanding and plan accordingly. This set of anchor artefacts needs to, at a minimum, include scope, benefits, plan, transitional ways of working assessment, resource plan and budget.
- The programme must conduct a risk assessment including Finance, Risk, Digital, Data from the business to review the deployment/rollout approach and to understand the risk per release/or big bang and to consider if it would be acceptable to “get stuck” at any transition states and what the mitigations could be.
- Finance planning - The programme, including Finance colleagues, needs to prepare for a range of scenarios depending on funding from DHLUC, demonstrating how the programme will proactively adapt rather than needing to enter into major replanning again.
- A focused team needs to be separated from the Release 1.0 work on the replan. The SRO and s. 40(2) and s. 40(2) need to agree a start/stop/continue existing “asks”/ “activities” to ensure that clarity on what is being asked for and delivered is available.

**The detailed matrix of observations, recommendations and mapping to themes and Homes England Areas of Focus is contained in Section 4.4 and Appendix D.**

## 4.2. Baselining the Core Understanding of Senior Stakeholders

As part of this Review, we interviewed stakeholders from Homes England to assess their level of understanding of the programme's vision, scope, deliverables, and benefits. To establish a baseline understanding, we put forward close-ended standard questions to all interviewees. These questions were designed to elicit specific information about the programme and its objectives, and to gauge the level of understanding among stakeholders. By asking the same questions to each interviewee, we were able to compare their responses and identify any gaps in knowledge or understanding. This approach helped us to gain a comprehensive understanding of the stakeholders' perspectives and informed our assessment of the programme's overall effectiveness.

	Question	Yes	No
1	Does the <i>programme</i> understand the <b>vision</b> of the Evolve Programme?	4	8
2	Does the <i>business</i> understand the <b>vision</b> of the Evolve Programme?	0	12
3	Does the <i>programme</i> understand the <b>scope</b> of the Evolve Programme?	4	8
4	Does the <i>business</i> understand the <b>scope</b> of the Evolve Programme?	0	12
5	Does the <i>programme</i> understand the <b>deliverables</b> of the Evolve Programme?	4	8
6	Does the <i>business</i> understand the <b>deliverables</b> of the Evolve Programme?	0	12
7	Does the <i>programme</i> understand the <b>benefits</b> of the Evolve Programme?	4	8
8	Does the <i>business (ELT)</i> understand the <b>benefits</b> of the Evolve Programme?	2	10

*Note: that there were two interviews where the responses captured did not directly answer the above questions, and hence excluded from the tally.*

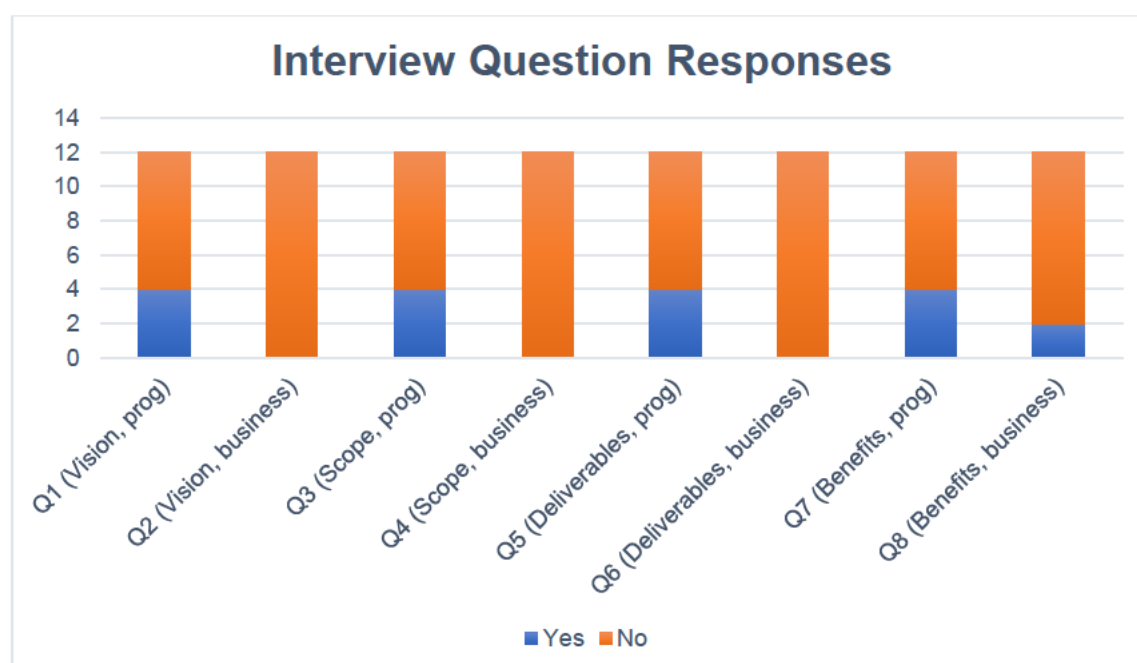


Chart 1. Showing results of the interview Q&A on stakeholders' perspective of the Evolve Programme.

## 4.3. Detailed Findings

The suggested areas of focus are listed in the Appendix C. As we progressed with our work, we made necessary amendments and adjustments based on the findings from interviews and file reviews. We also collaborated with the stakeholders to determine the areas that required more or less attention.

For ease, we grouped the findings in two ways:

- 1) Using the Areas of Focus. The description of what Homes England determined they would expect to find under each Area of Focus is marked in *italics*. This was used as the guidelines for exploration in each section.
- 2) A more narrative short form playing back the feedback from colleagues in the interviews and conclusions we draw from reviewing the documentation in a standalone form.

### 4.3.1. Customer & Scope

*Clear and documented scope, requirements, objectives, success criteria and benefits realisation plans.*

#### Scope

It was not evident that there is a clearly documented scope for the programme. As the review was taking place iterations of documentation were underway and a Scope v0.5 document was shared. However, when discussed with stakeholders there was not agreement that a clear scope was documented and when the programme leadership were asked about the scope document it was indicated that this was not a finished product.

Slide 4 of the scope 0.5 PowerPoint presentation indicates the challenges of the programme revisiting, revising the scope mid-flight in a significant way. It stated that the programme faced the challenge of:

*“The Single Pipeline Design lacked depth, omitting key capabilities...”*

In the enhancements to the scope:

*“Investments was built in isolation and will now be re-designed to align to enterprise designs and Single Pipeline.”*

Whilst these challenges were evident from other evidence gathered, the work to resolve these, was not at a sufficient level of maturity to give assurance that the programme now had a safe minimum design understanding for the Single Pipeline or that the governance for the Investments process design and technical architecture and build was suitability integrated across the business, programme, Digital and Data.

A number of the interviews touched on the confusion around the decommissioning of legacy platforms and the extent to which these were, or were not, in the scope of the programme. There was also confusion as to whether the programme should, and could, ever have managed to decommission the legacy platforms if the scope of the programme didn't cover all the activities currently performed by these legacy systems.



In the Scope v0.5 document, a number of items are stated as being “out of scope”. However, there was no evidence presented to demonstrate that a formal governance process had been implemented to track what falls within or outside of scope. The document also does not consider the impact on the benefits, scope, resourcing, budgets, transition states journey, and most importantly, ensure that any affected business unit acknowledges and accepts the business impact of undelivered items, and potentially accepting an activity for itself for the future.

## **Benefits**

The programme has set a deliverable target of 31<sup>st</sup> March 2024 to complete a single Benefits documents for the programme. A working plan for benefits tracking was shared as part of this Review. This listed 19 benefits; 7 primary and 12 secondary tier benefits. Of these, 7 were mapped against the release plan for the programme from 2022-2025, with 2 non-cashable and 1 cashable benefit marked as complete, and presumably therefore realised and signed off?] Four further primary benefits were marked against the plan (Release 3 October - 2024), and the remainder of the second-tier benefits are yet to be mapped.

It should be noted that it is not possible to have confidence in the projections of benefits work as the scope of the programme is not agreed. i.e. the understanding of the detailed scope that unlocks the realisation of benefits is not a piece of work that has been fully undertaken. Clarity on changes to the plan in terms of cost, time and scope and how this would affect benefits realisation is not possible. Therefore the programme leadership cannot advise the Programme Board, or the SRO, as to the full merits of any course of action.



### 4.3.2.Planning & Scheduling

*Appropriately detailed execution strategies, plans and schedules. Robust estimation techniques applied and there is clear integration between requirements, schedule, milestones, costs and budgets, and there are effective processes in place for tracking and managing interdependencies between workstreams.*

#### **Execution and Costing**

It was not possible to make any judgement in this area. Based solely on the scope and benefits workings, it is challenging to draw any positive conclusions about the execution strategies, plans and schedules.

Based on interview feedback, there was minimal, to no, confidence that the programme could execute according to its plans. Additionally, there was insufficient time to undertake the defined scope, although it's worth noting that different stakeholders may have had varying interpretations of the scope.

From discussions with stakeholders there was little confidence in the ability to manage interdependencies between workstreams.

In terms of financial budgeting, it was unclear what estimation techniques had been used to apply to each release.

Within the scope document shared, it indicated that costs for the finance implementation would be available from the end of February 2024, however by mid-March this cost was still not available other than in verbal, tentative form based on feedback in interviews.

s. 40(2)

The detailed finances and resourcing documents were not available at the point the report was completed, but as identified earlier it is unclear what reference/anchor point of a release schedule/scope/delivery plan this would have been triangulated with.

#### **Planning**

There is documentation relating to planning: Programme plan, scope documents but none of these provides clarity on the what, when, and impact that you would expect to find. It is unclear how any stakeholders be they: customer, colleague, Executive or programme board can understand: what is being delivered in detail and when; what is changing for each stakeholder group (in business and technical terms) and the benefit and risks associated with each release. For internal leaders it is unclear how any decisions they make could have an impact on the programme or be a dependency for the programme and therefore need to be impact assessed.

This view is then reiterated within the interview feedback.

A summary of the interview feedback was that interviewees felt there was no coherent view of scope, interdependencies, costs, budgets and requirements.

It is difficult to see how any oversight of the programme can be exercised based on the documents shared and the interview feedback supports this in practical terms.

There is a Project Initiation Document (PID) titled “DRAFT - Evolve Project Initiation Documents\_February\_DRAFT v0.2.docx” from February 2024 but it remains in draft form. This indicates a lack of integrated understanding of the programme outcomes and reinforces the absence of coordinated understanding among stakeholders. The document contains numerous “out of scope” statements but there is no quantification of whether these items were ever within scope or the consequences of their exclusion.

Of most concern, was the lack of evidence of an integrated approach to Service Design and a business process catalogue and end to end business process design.

### 4.3.3. Solution & Release

*The deliverables and outcomes meet customer requirements and deliver the desired benefits. There is a robust and viable release strategy that optimises the end user experience and minimises business disruption by taking into account change load and business capacity.*

During interviews, business leaders who had received or were receiving outcomes from Programme Evolve expressed concerns about the lack of detail in the scope definition. In both cases, the business took the initiative to drive the work forward rather than the programme leading a process to either explain the scope to be delivered or gather requirements. While either approach or a combination of both could be appropriate, it is expected that the programme should guide stakeholders through this process.

There was no evidence of detailed consideration given to the end user experience or minimising business disruption as part of the iterative planning cycle. Instead, the business change work to assess each release was done significantly late after the committed planning cycle. In the case of Release 1.0, feedback from interviews indicated that the understanding of the business impact was still being developed with only one month remaining before the release. Whilst it is typical for an iterative cycle of business change assessments to become increasingly detailed, there were no high-level documents providing an understanding of the business change impact shared in the review.

Based on interviews, colleagues were worried about the impact of Release 1.0, but had no reference point to confirm either way. Furthermore, no single business owner for Release 1.0 had been identified, and in the absence of this, there did not seem a clear structure for understanding which leaders were coming together to bring a joint senior evaluation of the deployment readiness, business readiness, business acceptance into service (Digital, Data, affected business units), etc.

Finally, one interviewee was frustrated with the tone of feedback that the business could not support the programme adequately stating that the amount of engagement with the programme was in of itself a burden. They gave an example of supporting programme discovery five times because of turnover of programme staff.

#### 4.3.4. Risk Management

*There are robust risk management practices in place, contingency is effectively applied and there are well understood triggers for escalation.*

In written documentation we have seen little evidence of formal programme governance being in existence or active. In the interview process, the understanding of a Programme Board as a governance group running over the last 18 months was diverse, with some colleagues suggesting it existed and met regularly and others saying that it barely met.

In any event, a Programme Board did not register as a place of doing business nor a place to escalate or raise issues or risks. A report on risk is provided to the Change Executive each month by the Risk team, but this is amongst other reports to that Committee. The ownership of risk and management of risk was not clear based on interviews and documentation seen.

To evidence this further, several colleagues spoke about the changing nature of the financial position of the programme, both in terms of funding allocated, funding received and ongoing resourcing internally in Homes England. The identification of an external financial funding risk, its translation into an issue, and the proactive management of this risk were not evident from the feedback received. During the interviews it was shared that a substantial reduction in funding during 2023/24 impacted the plan which resulted in a replan. However, there was a subsequent surprise of an additional capital expenditure in 2023/24 and once again colleagues are citing possible funding allocations as a risk for 2024/25. Despite these concerns, there is no evidence that planning process enables the programme to understand the consequences of any changes in the external funding arrangements.

Another example, is the withdrawal/loss of Digital resources in December 2023, as cited in interviews. During the interviews, it became apparent that there are existing concerns about the resourcing situation within Digital, Data and other business units. However, conversations regarding resourcing requirement of Evolve, the need for business units to have capacity to receive and, in the case of at least Digital and Data business units, proactively manage post-go-live appear to be lacking in a manner that will lead to effective resolution and proactive management of these issues.

Whilst there may be good practice on the programme regarding detailed risk management, overall management of the risks, issues, assumptions and dependencies at a Programme level integrated with the business units is not apparent.

#### 4.3.5. Capability and Culture

*There is the leadership, skills and capabilities and capacity that the programme requires and clear set of standards, controls and processes for the programme team to work within.*

## **Overall Leadership**

Not every successful programme has great controls, documentation, governance and processes. Not every failing programme has weak controls, documentation, governance and processes.

Successful programmes typically overcome their weaknesses through good to great cultures on the programme; up to and including the SRO and ok to good relationships with the wider business, recognising that there is always tension between programmes and business units. Often successful programmes have a few key people who hold trusted relationships with others, and this acts as the bridge to overcome the inevitable challenging and often grey, fuzzy, unpredictable moments.

Typically, programmes find themselves aligning to the more technical functions or the business units given key relationships and drivers. In the case of Evolve, neither the technical functions nor the business functions were supportive of the programme leadership or culture.

In terms of documentation, there was little evidence found of strong, integrated business unit leadership within the programme, strong collaborative working with Digital and Data teams and two receiving business areas spoken to, felt the programme had left them to it to manage their own journey from inception to delivery. Worrying one “SRO/business owner” interviewee indicated that in their opinion, regular meetings with the programme leadership stopped because the programme leadership did not like the views given by this leader.

In addition, the programme leadership reflected on a large turnover of programme directors, changing business ownership, and lurching from one direction to another, driven by finances or changes in business leadership of the programme.

## **Skills, Capacity, Capability**

Unfortunately for Programme Evolve, irrespective of the leadership issues between different stakeholders, the right culture does not seem to be in place for trusted relationships a key part of successful programmes.

Several interviewees spoke to the closed and secretive nature of the programme and how it seemed the Programme was an organisation in its own right. A couple of interviewees independently mentioned hearing Evolve colleagues talk about handing over delivery items to “Homes England” which struck a couple of interviewees as indicative of the mindset in the programme leadership that the programme somehow sat outside Homes England governance or control.

In terms of understanding the skills, capacity, and capability of the programme team a full review of all roles was not possible in the timescales. Instead, a high-level view has been taken based on interviews with the s. 40(2) [REDACTED], s. 40(2) [REDACTED], and senior colleagues from business units.

It is clear from the documentation shared that there is no clear set of standards, nor procedures that are working on the programme to define, refine and manage scope, plans, finances, and benefits. This is supported by the interviews, and indeed the feedback from programme colleagues themselves, who indicated they were working since December 2023 on an integrated plan and approach for the programme.

What is more significant, is that programme team does not appear to have pushed for more formal governance to ensure that the risks and issues they clearly are aware of, and vocalising, are resolved.

In interviews, opposing positions were struck between programme colleagues who felt that Data and Digital teams were fully engaged despite the programme suffering from an apparent withdraw of resourcing in December 2023, and Data and Digital colleagues who felt they were having to push into the programme to understand what was happening and that they were not being engaged well. Whilst the review cannot adjudicate on such matters, it is troubling to see Programme and Data and Digital leaders at odds as the tightest of alignments at a senior level is required between these colleagues. There is always a healthy tension between those shaping, designing, and delivering and those assuring, guiding and receiving but the interviews indicate much more deep-rooted challenges in the current setup of governance arrangements between these areas.

A troubling part of the interviews was to hear several colleagues talk about the culture of the programme management which ranged from not listening, behaving as a programme with no regard to the business impact, not sharing information, to one interviewee who indicated they had complained about a lack of professional behaviour they had experienced with programme leaders.

Looking to the end of the programme, Digital and Data functions seem unready and unequipped to support the end state, but also due to lack of clarity of the release cycle there appears to be a gap in decision making. Readiness for the end state and understanding of the transition states is a key requirement and no assessment of the readiness of the organisation at large to support the journey of change can be made without this. Equally, the programme flagged concerns about this which could lead to the programme being unable to hand over effectively or having to continue spend to support something once it is live beyond its fixed support period.

Finally, it should be noted that in some of the interviews, examples were sought of other successful programmes or areas that the culture worked better. Based on feedback to this question specifically and more implicit feedback across the interviews it was noted that cross organisation working is challenging in general due to a perceived historical silo-based culture and the sheer volume of work leading to colleagues feeling that cross-directorate work is rewarded less than objectives directly set on individuals and units.

#### **4.3.6. Commercial & Procurement**

*Contract management is effective and ensures control and optimisation of delivery.*

This was not a large part of the initial review based on the need to focus on scope, benefits, and planning.

Based on the limited documentation, and the most extensive conversations in interviews, there is no integrated approach to supplier or contract management underpinning the programme, not least, because the programme is not running as an integrated programme.

Two indirect experiences cited by interviewees which would suggest more work is required in this space were that:

- At least three technical suppliers are working on the programme and the scope and/or work package arrangements for them are being agreed by programme colleagues but seemingly on a project basis. It is unclear what assurance, oversight of this work has from Digital, Data colleagues.
- It is unclear what arrangements tie the outputs of the suppliers to the benefits and outcomes of the programme if any. In practical terms, are the suppliers delivering to the specifications and expectations of Homes England (permanent or contractor colleagues) and do Homes England fully accept all accountability for this? Or will there be a later expectation that suppliers did challenge, call out, offer advice which could have improved the end outcomes and therefore can be held more accountable in some way for their work? It is unclear from the review so far which arrangement Homes England believes it is working to, and when this is spread across three suppliers further risk emerges that inter-project, inter-supplier-Homes England versus supplier disagreements surface which erode any commercial negotiation Homes England might hope to have.

### 4.3.7.Finance

*There are robust financial control and reporting practices in place, and forward budget forecasts are realistic in respect of time and quality of proposed delivery.*

Based on interview feedback there was not confidence in the programme's financial forecast or the link with delivery. Furthermore, several interviewees spoke about being frustrated with the procurement and management of suppliers, and how this related to spend on the programme and lack of visibility of how this was achieving outcomes on the programme.

Some documentary evidence was made available but required further sessions to understand. However, there was insufficient time to undertake further interviews and therefore the underlying logic of any forecasting was not able to be reviewed. It is unlikely that this work would have had much benefit given the lack of agreed programme scope and agreed benefits to review it with.

A number of interviewees spoke about the difficulties in running the programme when funding allocated by Department of Levelling Up, Housing and Communities (DULHC) would vary and change year to year. The process of submissions into government departments and then a "bidding" and "allocation" process is not unusual. What seemed unusual was the outsized impact these processes had on the programme, and its inability to prepare for this cycle in each year. To be surprised and unprepared in the first year is something that perhaps shouldn't have happened in future years and suggests that it speaks to the lack of clarity of the path from delivery scope to resource cost and timings to an understanding of benefits. Given the programme faces this again in 2024/25 the interviewees gave no indication that the programme had any more robust controls, planning or support from the financial community to prepare for any adverse outcomes.



#### 4.3.8. Performance

*There is a clear approach to managing performance against the baseline requirements, identifying variance and clear change control and escalation protocols.*

At a macro-level, there is no evidence or interview feedback that provides good indication that these processes are working. This is seemingly because the baseline does not exist.

The Change Request process looks robust on paper. But there is no evidence of change requests. The process references programme board but multiple stakeholders say no or few programme boards have taken place in the last 12-15 months. If the process exists, then the documentation, however well-completed, is not working to provide stakeholders with clarity of decision-making and associated impacts. The form implies an understanding of benefits, costs, scope and deliverables that if true would mean the programme would not be in the place this report is identifying.

The Business Case is a significant perception problem; in that colleagues do not believe it can be achieved. It is clear the business case cannot be changed, and therefore, a new construct of value and outcomes is needed to help people align around a shared vision and objectives. Senior stakeholders can hold the mapping of the business case to this new construct, but it enables everyone else to look to something that they *believe* can be achieved and is ambitious, but realistic. The lack of shared ownership derives in some part to no one feeling that the aim can be achieved and therefore this creates a *not my problem, why bother* mindset which is evident in some of the interviews.

#### 4.3.9. Governance

*There is an adequate stakeholder management and communication strategy to support effective implementation of the programme, this is supplemented with a robust business change strategy. There is suitable business sponsorship for the programme, governance arrangements are effectively administered and supported by relevant status reporting. The programme has provisioned for independent assurance and scrutiny at critical points within the Lifecycle.*

The review identified significant shortcomings in the Evolve programme's governance structure. The SRO cannot access a comprehensive understanding of the programme's scope, deliverables, plan, costs, and impact. This lack of clarity extends to other senior business leaders, as evidenced by the interviews and documentation reviewed.

Furthermore, the programme's technical governance appears inadequate. The review did not identify a well-defined and consistently applied set of governance processes. Even if such processes exist, stakeholder interviews revealed concerns about their effectiveness and implementation.

Examples of concern in terms of the current status of the programme from a Change Management perspective are:

- Communications and stakeholder engagement strategy v0.1 written in February 2024.
- Stakeholder map document appears to be in draft and uncompleted.
- Change Management Approach shared had Environment Agency logos on it.
- Material, including foundation artefacts appear to being developed very late in the programme, this was also reiterated as a concern in the interviews.
- Most of the Change management materials were in draft or project specific. This would support the assumption that the collateral at the programme level is not mature, complete, or well understood and embedded. Again, this is backed up by interviews.

The review identified several critical areas requiring immediate attention within the Evolve programme's controls, documentation, and governance. These factors raise significant questions about the programme's ability to deliver within the established timeframe and budget.

Furthermore, the lack of transparency and action to address these misalignments is a cause for serious consideration. It raises questions about accountability, ownership, and the willingness to engage in open dialogue about the programme's challenges. The review did not identify evidence of healthy tension or constructive discussions regarding the feasibility of deliverables or the need for adjustments to timelines.

An illustrative example of these issues is the conflicting perspectives on the "Programme Evolve Data Programme." Three different interviewees provided vastly different interpretations of this initiative, ranging from a separate programme with dedicated funding to an integrated component within the existing programme. This fundamental lack of alignment among key stakeholders highlights the programme's weak governance structure and ineffective communication channels.

While programme colleagues are making efforts, the review suggests a lack of realism regarding the ability to meet established deadlines. This issue appears to extend beyond scheduling concerns and reflects a deeper cultural issue related to speaking up and challenging unrealistic expectations or inaccurate status reporting.

To conclude, several senior stakeholders shared that they had recommended to the CEO that the programme be stopped. This feedback suggests that concerns remain at the highest levels regarding the programme's achievability in its current form.

Most stakeholders acknowledged that the programme was not performing as expected. However, a sense of ownership and accountability for addressing the challenges was lacking. Individuals felt that the problems were beyond their control and that the organisation lacked clear plans for resolution. This resulted in a passive stance, with stakeholders observing the situation without actively contributing to finding solutions. The overall sentiment was that addressing the issues was too difficult and required intervention without any clarity on where this would come from.

Within those small group of interviewees, all recognised that for broader reasons the programme must continue and therefore whilst it would be ideal to stop the programme altogether, it is not a viable choice for the Agency. The findings and recommendations in this report are based on this assumption.



In terms of ongoing scrutiny and assurance, there was discussion of stage gate management but in the absence of functioning programme and project governance the value of this is limited.

## 4.4. Action Plan

In this section, we lay out our recommendations and timebound actions for implementation that we believe could help Homes England to be more successful on the Programme Evolve delivery in 2024/25 based on the information we have received, and the interviews conducted.

The below list is not exhaustive but a set of urgent recommendations which if agreed with by Homes England, should enable many of the impacts of the findings earlier in the document to be mitigated or reduce the risk overall.

For ease we have also mapped the Action Plan to Areas of Focus in Appendix D.

### Action Plan by Recommendation Theme

ID	Theme	Sub-Theme	Action	By When	Why?	Risk if not undertaken?
1.	Replan	Plan	The Programme needs a replan phase to be agreed for beyond Release 1.0 which brings together senior programme leaders and directors in the business areas impacted to produce key programme artefacts to be able to answer the Exam Questions listed earlier in the document.	ASAP (in the next month)	There is no coherent set of artefacts that all stakeholders can align on and commit to.	There is no clarity of what the value the programme will deliver, does deliver and where the spend has gone.
2.	Governance	Formal	Programme governance needs to be reinstated and during the replan time, a parallel set of biweekly meetings are needed for R1.0 and the replan.	ASAP (in the next month)	There have been little or no formal governance meetings taking place outside of change committee which is too high level to grapple with the challenges and to explore and discuss the risks, issues,	The programme and business continue to feel blind as to where decisions are made and how issues are dealt with.

					dependencies and assumptions appropriately.	
3.	Replan	Plan	A plan for the replan phase needs to be drawn up to ensure the question of whether projects, suppliers and Homes England colleagues are working on valid activity that will be valuable irrespective of the outcomes of a replan.	ASAP (in the next month)	It is unclear how people's time is being focused on activities that contribute effectively towards the work for the remaining year. Given pressures on people and morale potentially stopping or pausing some work whilst clarity is sought provides some short-term relief, saves some money and allows a refocused effort to begin later.	The programme will continue to drift.
4.	Replan	Resources	Ideally a focused team needs to be separated from the R1.0 release to work on the replan. The SRO and s. 40(2) needs to agree a start/stop/continue existing "asks"/ "activities" to ensure that clarity on what is being asked for and delivered is available.	ASAP (in the next month)	It is clear that many of the "right" things have been requested by the SRO, but it seems to be taking a long time to produce. It is also unclear where these artefacts are going and when they are landing. It is vital to draw a line and work out all the demands on the leaders of the programme now and validate these. What is priority?	Activities continue to take too long or be half completed.
5.	Replan	Key Artefacts	The programme needs a set of key artefacts to be able to communicate understanding and plan accordingly: <ul style="list-style-type: none"> <li>a short visual release journey map</li> <li>a release plan highlighting each transition state.</li> </ul>	End of June 2024	At present no one can answer the Exam Questions 1) and 2) stated above and the programme needs to have anchor positions that it can track, monitor and reevaluate through the delivery journey. The replan must produce these and then these should be living documents, used in all governance and decision making as well as to	The programme cannot articulate its purpose, delivery and why the money given will be justified.

			<ul style="list-style-type: none"> <li>defines the scope in terms meaningful to business and technical communities.</li> <li>what the benefits/value is in financial and non-financial terms</li> <li>the impacted business colleagues and customer experiences in a [stop, start, continue guide].</li> <li>The as-is and to-be architecture changes at each transition point</li> </ul>		form part of the business change and communications journey.	
6.	Replan	Key Artefacts	The programme must conduct a risk assessment including finance, risk, Digital, Data from the business to review the deployment/rollout approach and to understand the risk per release/or big bang and to consider if it would be acceptable to “get stuck” at any transition states and what mitigations could be.	ASAP (in the next month)	In undertaking this exercise, the details of the scope journey, the impact on business users will be fleshed out and the considerations of what a stop for any reason (i.e. funding withdraw, skills issues, BAU overload, deployment drag in terms of extended support by programme) will be understood. There will then be a much better integrated view of the consequences of each release.	A cliff edge between the programme and Digital and Data will emerge, and also Digital and Data may or may not be able to support the releases leading to programme delays.
7.	Governance	Formal	The SRO needs to identify the key individuals from the business who need to be brought into the tent in terms of soft and formal	ASAP (in next month)	The culture of the Evolve programme needs to change from an ‘us’ and ‘them’ to a combined ‘we’. The business needs to have more say, but also be more	The business continues to be disconnected.

			communications and governance. A <i>Service Director</i> community needs to be built where ongoing programme to business dialogue, information sharing, RAID discussion and <i>leaning in</i> becomes the norm. This sits outside the programme board governance		attuned to the challenges of the programme. The programme leadership need to be more accountability to the business in sharing ongoing discussions, before decisions this in turn, will help better decision making.	
8.	Engagement	Culture	A regular survey of the colleagues interviewed and then a fuller survey of programme and business colleagues is needed to check communications and clarity on roles and responsibilities, scope and understanding is improving. Even asking the same standard questions in the interviews to the colleagues in a month's time would be helpful to manage direction of travel.	End of May 2024	The programme needs to understand how programme colleagues are feeling and to have some way of tracking the success of the replan, reboot activities. Do colleagues understand the integrated plan, the behaviours required, the activities now in train, the future releases, what are colleagues worried about? All this, alongside the Service Directors work brings a more rounded understanding of whether everyone is together on the journey and understands the ask and how to get there.	Programme colleagues continue to be disconnected and disengaged.
9.	Replan	Plan	As part of the replan process, the key supplier, Digital, Data and programme architects need to be brought together to <i>find a way</i> to deliver the optimal value path.	End of May 2024	As part of the integrated planning in the replan, all the architects from wherever in the business need to understand the macro journey of Evolve in order to ensure that all disparate activities in BAU, other programmes and within Evolve are clear on the architecture changes.	All architects across Homes England are not clear on the consequences of choices and/or a narrative continues to exist that parts of the organisation are not sighted/involved in the programme. Equally architects

					Furthermore, there needs to be an acceptance of decisions through engagement rather than “I don’t understand/I don’t agree”.	need to come to the table with solutions and to avoid in the future any <i>ivory tower</i> moments.
10.	Programme	Ways of Working	The finance and risk business partner modelling needs review as to how these inputs work into the programme and how visibility of their work and the actions arising are managed.	End of May 2024	The finance and risk perspective on the programme is detached and not integrated into decision making and constructive feedback.	Finance and Risk continue to be elements on the periphery of the programme and risk and finance issues are missed.
11.	Programme	Ways of Working	All business areas need to commit to an expectation of business impact and resourcing to support Evolve and to confirm the priority requirements to deliver. In the case of Digital and Data there needs to be a special focus on its responsibilities to support the programme, how it wants to/ needs to – design/assure architecture and how service transition and ongoing delivery will be managed post go live.	End of June 2024	The disconnect between the business, data and digital, and the programme is damaging and will harm the success of any releases. As part of the replan gaining challenging, but achievable, resource confirmation, skills coverage and service acceptance principles is key to the Evolve journey.	Releases may be delayed, further disengagement may occur delaying build of releases and the overall “dragnet effect” of previous releases will stop the programme moving forward.
12.	Engagement	Culture	Senior executives, not just the SRO, need to relaunch/reboot programme in a visible way once a replan is done,	Mid-June 2024	People across Homes England, need to believe that the programme scope is achievable. They need to see senior leaders	The disconnect evidenced in the findings continues.

			to share remaining scope and to instil a belief in key colleagues on the programme and with colleagues who are key to programme from the business.		come together and commit to deliver.	
13.	Programme	Commercials/Procurement	Without any key documents in place [see action 5] the Commercial/Supplier arrangements need a step back. This is across the programme and Digital and Data. What can be assured to proceed, what is in debate in terms of delivery partner scope requirements, internal skills and capability to support programme and then the balance requiring contingent labour or delivery partner resource. What are the end state requirements/or principles that will guide procurement of Managed Service arrangements? Once the scope is understood and these are documented for shared clarity a review of the commercial approach should be undertaken	ASAP (in next month)	Commercial and supplier management is struggling to be aligned to programme and BAU needs.	A continued reality [or continued perception] of confusing arrangements for Data, Digital and programme with regard to supplier provision, accountability on deliverables will continue. Suppliers will be unable to deliver their best as a mismatch of expectations will lead to difficult and unnecessary conversations.

14.	Replan	Plan	Finance planning. The programme including finance colleagues need to prepare for a range of scenarios depending on funding from DHLUC. How will the programme proactively plan rather than react and must go into major replanning again?	ASAP (in the next month)	The programme has suffered long periods of uncertainty, adjustment and confusion following DHLUC funding allocations. A proactive approach to this, combined with building into the Key Document production the information that enables an easier understanding of “break points” will enable the programme not to be as disabled in the future by any unexpected changes.	A change in the funding could be destabilising again to the programme resulting in further uncertainty and more loss of time.
15.	Programme	Ways of Working	There remains a very strong project/pillar perspective. The pivot now to programme is very late. People don't understand the change in thinking needed. This needs a cultural and leadership thinking reboot within the programme. A charter, or away day workshop is required to bring together all teams and instil integrated thinking at their core.	ASAP (in the next month)	It appears that the programme is struggling to make the transition from individual items to an integrated plan. Particularly given remote working, a face-to-face event is needed to help colleagues complete that journey and agree new ways of working, or cement agreed ways of working to make this transition and make an end to the previous model.	The programme will continue to work in different ways, to different speeds and in different ways.
16.	Governance	Key Artefacts	A new way of framing accountability, objectives is needed to align all senior colleagues.	ASAP (in the next month)	The business case is the business case, and no change in that is possible. However, moving people on and helping them recognise something <i>achievable</i> in their minds is helpful.	No one believes in the business case, no one feels accountable for it. It is too old, signed before any of the current executives or directors were in post. If nothing is done, people will continue to feel disconnected and unaccountable for outcomes.



17.	Engagement	Culture	A joint playback to Executive by the business leaders/SROs and programme leadership – this is what we are doing, all committed, all focus on this should be undertaken and then regularly repeated. This should be supported by the same playback occurring at programme boards first.	ASAP (in the next month)	The focus on programme Evolve should be a team game. All the organisation at a macro level should be committed and the Executive team as a whole need to feel more engaged, more accountable and with collective “skin in the game”. Regular updates and support sessions are key to this.	Colleagues need to feel senior leaders are with them and sharing the pressures and successes, and senior colleagues need to be able to be supportive but also have the opportunity to challenge and understand. Without this everyone is disconnected.
18.	Governance	Process	Change Control/Scope control put in place in Evolve and any related Digital, Data change plans/activity plans for 24/25. Ideally a Homes England Business Design Authority and Technical Design Authority is made more active/put in place.	ASAP (in the next month)	Whilst a process for change control exists there is no evidence this is working well, nor are they any “anchor” documents to assess against. As soon as this work is complete from the Exam Question/Replan work and even during this in draft, the scope change control process needs rebooting, reasserting and enforcement as necessary.	The programme will continue to drift with mixed messages on scope, confusing business stakeholders. Digital and Data plans for work will overlap, confuse, risk undermining programme activities and vice versa, resource and technical contention may emerge.
19.	Governance	Formal	Clarity on the Evolve Release 1 impacted business owner(s) needs to be resolved. Who is accountability for assuring the business impact and receiving and accepting the Release in an integrated form?	ASAP (in the next month)	During the interviews there was lots of uncertainty as to what the scope of Release 1.0 was, the impact of it in the business and who would be managing the business and technical support for it post go live. To make a go / no decision the SRO needs more assurance from both the programme, business receiving and Digital and Data receiving units that they are all joined up on	Without this it may “go-live” but no one feels they own any of the consequences and potentially a blame culture may emerge if things get difficult.

					the release, its cutover/go live impact, how it will be supported and the impact on end state resourcing beyond day 1.	
20.	Replan	Approach	Agree an integrated service design approach as part of the core programme activity moving forward.	ASAP (in the next month)	The approach to design is fragmented across business units and between different workstreams. This is leading to a lack of integrated understanding of the design needed to deliver new ways of working	The programme will continue to be unable to answer key questions about the impact of releasing functionality in the full organisational context of people, process, data, and other IT systems.
21.	Replan	Approach	Determine how end to end business process design will be undertaken, and then how a business process catalogue is constructed and maintained as a key programme artefact.	ASAP (in the next month)	The approach to business process design and having a catalogue that supports multiple business planning and programme artefacts is key.	The programme will continue to be unable to answer key questions about the scope of the programme, draw boundaries around what is in scope and out of scope as well as not have a key artefact for planning, resourcing and estimating.
22.	Governance	Process	Formalise a Stage gate assurance process and consider the possibility of ongoing independent reviews/support for the SRO and programme Board	Ongoing	The commissioning of this review has highlighted that the ability of the programme and interested groups such as Digital, Data have not been able to effectively review the programme or provide confidence to the SRO that the programme is progressing in a planned, agreed and safe manner.	If the stage gate assurance continues to be ineffective then the programme will continue to be at risk of providing unintended false confidence to business stakeholders and the SRO resulting in ongoing surprises.

• **Note:** A final action that needs to be considered given feedback in interviews, but we were unable to determine the extent of the problem analysis /ongoing work/active plans in this space, is the analysis and then action to ensure that Digital and Data have the skills, capacity and capability to handle the work of Evolve. The receipt of completed releases, the ongoing continuous improvement and continuous development/support of these new ways of working/functionality/systems in business as usual, and supporting the programme proactively needs the right support.

#### 4.5. Appendix A: Interview Schedule

Week 1 (commencing 26<sup>th</sup> February 2024): Fact-finding

Name	Job Role	Date of Interview
s. 40(2)	s. 40(2)	28/02/2024
	s. 40(2)	28/02/2024
	s. 40(2)	29/02/2024
	s. 40(2)	29/02/2024
	s. 40(2)	29/02/2024
	s. 40(2)	29/02/2024
	s. 40(2)	29/02/2024
	s. 40(2)	01/03/2024
	s. 40(2)	01/03/2024
	s. 40(2)	01/03/2024

Week 2 (commencing 4<sup>th</sup> March 2024): Post material review

Name	Job Role	Date of Interview
s. 40(2)	s. 40(2)	08/03/2024
	s. 40(2)	08/03/2024
	s. 40(2)	08/03/2024
	s. 40(2)	07/03/2024
	s. 40(2)	06/03/2024

Week 3 (commencing 11<sup>th</sup> March 2024): Post material review

Name	Job Role	Date of Interview
Kristy Shaw	Chief Operating Officer	14/03/2024
Lynda McMullan	Chief Financial Officer	13/03/2024

Week 4 (commencing 18<sup>th</sup> March 2024): Post material review

Name	Job Role	Date of Interview
s. 40(2)	s. 40(2)	14/03/2024

## 4.6. Appendix B: List of Materials Received and Reviewed

Category	Typical Templates	Name of Document Received
Governance	Programme Vision	Transformation Business Case - v1
	Programme Charter	Homes England Portfolio Definition Document.doc
	Programme Structure	Evolve Organisation Chart February 2024
	Roles and Responsibilities including RACI	Workstream roles and responsibilities - RACI.xls
	Governance Structure	
	Steering Committee Terms of Reference	(Post Jan 2024) Evolve Governance Boards ToRs Pack v0.6.pdf
	Meeting Cadence	
	Meeting Minutes	2023-11-03 Evolve Programme Board_ MINUTES_v1.0
	Decision Logs	
	Action Logs	
	Business and Programme Principles	
	Programme Team Member Activities and Key Deliverables	Documents: 1) Evolve scope v0.5 2) POAP 3) Detailed plan
	Programme Status Process	-

Programme Scope and Change Control	High-level Scope	Evolve Scope Document v0.5.pptx
	Business Case	(Unable to be shared)
	PID	DRAFT of the Master Evolve PID which is still work-in-progress at the time of the report.
	Service/solution overview	Available for Release 1
	Data Architecture (Including Data Model - As-Is, Transition, To-Be)	1) AgencyCDM.pdf 2) AgencyCDM Plus Business Areas.pdf 3) Homes England CDM Business Glossary.xls 4) LDM - Pipeline .png
	Interim state/Transition state Journey - Customer/Colleague	-
	Interim state/Transition state Journey - Interfaces/Architecture	-
	Change Control Process	Change Control Process and Guidance v0.4.pptx
	Change Requests	Change Request Form TEMPLATE v0.2 (1).xlsx
	Change Management Strategy	Change Strategy Approach 1) Overarching Evolve change strategy - new change approach v2 2) Investments Change Strategy approach

		3) Release 1 Draft Change Management Approach
Change Management	Business Change Plan/Business Readiness Impact Assessment	Change Impact and Readiness Assessment v3
	Stakeholder Strategy	This is folded into the Stakeholder Comms Plan and Stakeholder Assessment documents.
	Stakeholder Communication Plan	<p>EVOLVE Communications and Stakeholder Engagement Strategy V0.1.docx</p> <p>1) ""Evolve Stakeholder Monitoring and Communications Plan MASTER (Revised Released based approach).xls""</p> <p>2) Evolve Communications and Stakeholder Engagement Strategy.doc</p> <p>3) ""Investments Communications and Engagement Plan"" - This plan stands for the scope of Release 1.</p>
	Stakeholder Assessment	<p>Evolve Stakeholder Monitoring and Communications Plan MASTER (Revised Release based approach)</p> <p>1) Evolve Communications and Stakeholder Engagement Strategy.doc</p> <p>2) Stakeholder Analysis - This plan stands for the scope of Release 1.</p>
	Change Management Approach and Resource Plan	Change Management Approach
	Communication Plan	Investments Communications and Engagement Plan - This plan stands for the scope of Release 1.
Planning and Resource Management	Project Plans (Programme Workstreams)	<p>Evolve Portfolio 010324.mpp</p> <p>Documents:</p> <p>1) Evolve scope v0.5</p> <p>2) POAP</p> <p>3) Detailed plan</p>

	Programme Plan	WIP
	Resource Plan	Resource Graph_March 2024 (with names removed)
	Decommissioning Plan	Evolve is currently discussing the decommissioning strategy with Homes England Digital Team who own this.
	BAU organisation structure charts for Digital, Data and Change	-
	Critical Path	Change Portfolio POAP Evolve Plan -Critical path_050324
	Planning Assumptions	Included in the Evolve Scope v0.5 document
	Supplier Contracts	-
	Lessons Learnt	Lessons Learnt are captured at Stage Gates - example document included of Lessons Learnt for the CRM project.
RAID (Risks, Assumptions, Issues, Dependencies)	Risk Management Process	Homes England Risk Mgmt Framework Change Programme Risk Guardrails
	Risk Log	Three documents: 1) Corestream screenshot shared - Download will be sent through by s. 40(2) 2) Digital RAID log shared 3) RAID Log guidance
	Mitigation Plans	Mitigations and controls / associated actions are included in the Log and also in CoreStream
	Lessons Learnt	Lessns learnt captures for Stage Gates and not done as part of RAID log maintenance activities

	Issue Logs	1) Digital RAID log shared 2) RAID Log guidance
	Decision Logs	Actions and Decisions Log
	Dependency Management Process	Dependencies are managed through tracking the Project Plan
	Dependency Log	Dependencies are included in the Project Plan.
	Assumptions Log	Assumptions were previously included in the different Project PIDs. Assumptions will be carried into the new Evolve PID.
Budget and Cost	Budget vs Actuals Reporting	Complex finance spreadsheets available.
	Benefits Mapping/Benefits Card	New Evolve Priority Benefits Register WIPv0.2
	Benefits Tracker	New Evolve Priority Benefits Register WIPv0.2
	Budget	Several iterations of budget setting available.
	Forecast	Complex finance spreadsheets available.
	Capital/ Revenue constraints	Capitalisation basis documentation from Tech Finance available.
Quality / Performance Reporting	Supplier Deliverables List	Deliverables tracker - Investments Beta _Jan 2024 (example)
	KPIs to Track and Measure Progress	Investments Beta Loans MVP Report _extract_example
Deliverables Tracking (can be part of ongoing project)	Acceptance Criteria	In Evolve Checklist - Stage Gate Tracker V1.3 New Delivery Plan



management and oversight)	Deliverables List	Deliverables tracker - Investments Beta _Jan 2024 (example)
	Sign-off Documentation	In Evolve Checklist - Stage Gate Tracker V1.3 New Delivery Plan
	Stage-gate Management Process	In Stage Gates Process _v1.1

#### **4.7. Appendix C: List of Areas to Cover based on Initial Request**

- Customer & Scope - Clear and documented scope, requirements, objectives, success criteria and benefits realisation plans.
- Planning & Scheduling - Appropriately detailed execution strategies, plans and schedules. Robust estimation techniques applied and there is clear integration between requirements, schedule, milestones, costs and budgets, and there are effective processes in place for tracking and managing interdependencies between workstreams.
- Solution & Release - The deliverables and outcomes meet customer requirements and deliver the desired benefits. There is a robust and viable release strategy that optimises the end user experience and minimises business disruption by taking into account change load and business capacity.
- Risk Management – There are robust risk management practices in place, contingency is effectively applied and there are well understood triggers for escalation.
- Capability and Culture – There is the leadership, skills and capabilities and capacity that the programme requires and clear set of standards, controls and processes for the programme team to work within.
- Commercial & Procurement - Contract management is effective and ensures control and optimisation of delivery.
- Finance – There are robust financial control and reporting practices in place, and forward budget forecasts are realistic in respect of time and quality of proposed delivery.
- Performance – There is a clear approach to managing performance against the baseline requirements, identifying variance and clear change control and escalation protocols.
- Governance – There is an adequate stakeholder management and communication strategy to support effective implementation of the programme, this is supplemented with a robust business change strategy. There is suitable business sponsorship for the programme, governance arrangements are effectively administered and supported by relevant status reporting. The programme has provisioned for independent assurance and scrutiny at critical points within the Lifecycle.

## 4.8. Appendix D - Interview and Document Playback

### Interview Summary

This summary is based on feedback from the interviewees.

The Evolve programme came out of a business case created and signed off in 2018/2019 by the previous Executive team under the previous CEO of the Agency.

During the lifecycle of the Programme there have been several Senior Responsible Officers. For approximately 3 years, it has been under the s. 40(2) and in January 2024 this responsibility moved across to the Chief Operating Officer.

The programme started out as a series of projects/pillars of work. Numerous stakeholders spoke of how the programme was not set up properly; it was siloed, a series of independent projects, had poor governance/little governance and no focus on the business case or tracking against outcomes.

The programme underwent a series of replans, so much so that in a number of calls colleagues would have to check “which” replan they were referring to. Again, there was a lack of consistency as to what the key events and inflection points in the journey of the programme have been with regard to plans, budgets and delivery.

One perspective would be that in the move from projects to an integrated programme the reforms requested by the SRO in the last few months haven’t worked fast enough and that programme documentation and communications fail to keeping up with pace.

A different perspective would be that documentation and detail didn’t exist at project level and the change to the integrated plan has meant constructing lots of artefacts and collecting/gathering/discovering information from scratch and this has required lots of work.

The CRM system is the only tangible outcome that consistently emerged from interviews. Whilst a few colleagues mentioned the programme/projects had delivered, tangible examples were not forthcoming. The story of delivering of CRM was mixed, with interviewees stating that it was a success because of the business team leaders, almost in spite of the programme rather than because of the joint leadership.

At present the programme is engaged in a replanning exercise which appears to have been running since September or December 2023 (depending on feedback in bringing together the disparate activities/projects/pillars into a programme plan). This has not concluded at the time of writing the report.

## **Documentation Review Summary**

In reviewing the documentation, it was hard to draw together the key artefacts you would expect to see on a programme, this was amplified by the draft nature of some of the documentation. There were examples of good practice and methodology – project level change work, a change request form, but no evidence that these processes are working or occurring in a meaningful way in practice at programme and project level.

## 4.9. Appendix E - Action Plan Mapped to Areas of Focus

ID	Linked to Areas of Focus	Action	By When	Why?	Risk if not undertaken?
1.	Customer and Scope Planning and Scheduling	The Programme needs a replan phase to be agreed for beyond R1.0 which brings together senior programme leaders and directors in the business areas impacted to produce key programme artefacts to be able to answer the Exam Questions listed earlier in the document.	ASAP (in next month)	There is no coherent set of artefacts that all stakeholders can align on and commit to.	There is no clarity of what the value the programme will deliver, does deliver and where the spend has gone.
2.	Governance Performance	Programme governance needs to be reinstated and during the replan time, a parallel set of biweekly meetings are needed for R1.0 and the replan.	ASAP (in next month)	There have been little or no formal governance meetings taking place outside of change committee which is too high level to grapple with the challenges and to explore and discuss the risks, issues, dependencies and assumptions appropriately.	The programme and business continue to feel blind as to where decisions are made and how issues are dealt with.
3.	Customer and Scope Capability and Culture	A plan for the replan phase needs to be drawn up to ensure the question of whether projects, suppliers and Homes England colleagues are working on valid activity that will be valuable irrespective of the outcomes of a replan.	ASAP (in next month)	It is unclear how people's time is being focused on activities that contribute effectively towards the work for the remaining year. Given pressures on	The programme will continue to drift.

				people and morale potentially stopping or pausing some work whilst clarity is sought provides some short-term relief, saves some money and allows a refocused effort to begin later.	
4.	Customer and Scope Planning and Scheduling	Ideally a focused team needs to be separated from the R1.0 release to work on the replan. The SRO and s. 40(2) needs to agree a start/stop/continue existing “asks”/ “activities” to ensure that clarity on what is being asked for and delivered is available.	ASAP (in next month)	It is clear that many of the “right” things have been requested by the SRO, but it seems to be taking a long time to produce and it is unclear where these artefacts are going and when they are landing. It is vital to draw a line and work out all the demands on the leaders of the programme now and validate these. What is priority?	Activities continue to take too long or be half completed.
5.	Customer and Scope Planning and Scheduling Governance Risk Management	The programme needs a set of key artefacts to be able to communicate understanding and plan accordingly:  • a short visual release journey map	End of June 2024	At present no one can answer the Exam Questions 1) and 2) stated above and the programme needs to have anchor positions that it can track, monitor	The programme cannot articulate its purpose, delivery and why the money given will be justified.

		<ul style="list-style-type: none"> <li>• a release plan highlighting each transition state.</li> <li>• defines the scope in terms meaningful to business and technical communities.</li> <li>• what the benefits/value is in financial and non-financial terms</li> <li>• the impacted business colleagues and customer experiences in a [stop, start, continue guide].</li> <li>• The as-is and to-be architecture changes at each transition point</li> </ul>		and reevaluate through the delivery journey. The replan must produce these and then these need to be living documents used in all governance and decision making as well as to form part of the business change and communications journey.	
6.	Solution and Release	The programme must conduct a risk assessment including finance, risk, Digital, Data from the business to review the deployment/rollout approach and to understand the risk per release/or big bang and to consider if it would be acceptable to “get stuck” at any transition states and what mitigations could be.	ASAP (in next month)	In undertaking this exercise, the details of the scope journey, the impact on business users will be fleshed out and the considerations of what a stop for any reason (i.e. funding withdraw, skills issues, BAU overload, deployment drag in terms of extended support by programme) will be understood. There will then be a much better integrated view of the	A cliff edge between the programme and Digital and Data will emerge, and also Digital and Data may or may not be able to support the releases leading to programme delays.

				consequences of each release.	
7.	Governance Solution and Release	The SRO needs to identify the key individuals from the business who need to be brought into the tent in terms of soft and formal communications and governance. A <i>Service Director</i> community needs to be built where ongoing programme to business dialogue, information sharing, RAID discussion and <i>leaning in</i> becomes the norm. This sits outside the programme board governance	ASAP (in next month)	The culture of the Evolve programme needs to change from an 'us' and 'them' to a combined 'we'. The business needs to have more say, but also be more attuned to the challenges of the programme. The programme leadership need to be more accountability to the business in sharing ongoing discussions, before decisions this in turn, will help better decision making.	The business continues to be disconnected.
8.	Capability and Culture Governance	A regular survey of the colleagues interviewed and then a fuller survey of programme and business colleagues is needed to check communications and clarity on roles and responsibilities, scope and understanding is improving. Even asking the same standard questions in the interviews to the colleagues in a month's time would be helpful to manage direction of travel.	End of May 2024	The programme needs to understand how programme colleagues are feeling and to have some way of tracking the success of the replan, reboot activities. Do colleagues understand the integrated plan, the	Programme colleagues continue to be disconnected.



				<p>behaviours required, the activities now in train, the future releases, what are colleagues worried about? All this alongside the Service Directors work brings a more rounded understanding of whether everyone is together on the journey and understands the ask and how to get there.</p>	
9.	Customer and Scope Solution and Release	<p>As part of the replan process, the key supplier, Digital, Data and programme architects need to be brought together to <i>find a way</i> to deliver the optimal value path.</p>	End of May 2024	<p>As part of the integrated planning in the replan, all the architects from wherever in the business need to understand the macro journey of Evolve in order to ensure that all disparate activities in BAU, other programmes and within Evolve are clear on the architecture changes. Furthermore, there needs to be an</p>	<p>All architects across Homes England are not clear on the consequences of choices and/or a narrative continues to exist that parts of the organisation are not sighted/involved in the programme. Equally architects need to come to the table with solutions and to avoid in the future any <i>ivory tower</i> moments.</p>

				acceptance of decisions through engagement rather than “I don’t understand/I don’t agree”.	
10.	Finance Risk Management	The finance and risk business partner modelling needs review as to how these inputs work into the programme and how visibility of their work and the actions arising are managed.	End of May 2024	The finance and risk perspective on the programme is detached and not integrated into decision making and constructive feedback.	Finance and Risk continue to be elements on the periphery of the programme and risk and finance issues are missed.
11.	Customer and Scope Governance Risk Management Capability and Culture	All business areas need to commit to an expectation of business impact and resourcing to support Evolve and to confirm the priority requirements to deliver. In the case of Digital and Data there needs to be a special focus on its responsibilities to support the programme, how it wants to/ needs to – design/assure architecture and how service transition and ongoing delivery will be managed post go live.	End of June 2024	The disconnect between the business and data and digital and the programme is damaging and will harm the success of any releases. As part of the replan gaining challenging, but achievable, resource confirmation, skills coverage and service acceptance principles is key to the Evolve journey.	Releases may be delayed, further disengagement may occur delaying build of releases and the overall “dragnet effect” of previous releases will stop the programme moving forward.
12.	Governance	Senior executives not just SRO need to relaunch/reboot programme in a visible way once a replan is done, to share remaining scope and to instil a belief in key colleagues on	Mid-June 2024	People across Homes England need to believe that the programme scope is achievable.	The disconnect evidenced in the findings continues.

		the programme and with colleagues who are key to programme from business		They need to see senior leaders come together and commit to deliver.	
13.	Finance Commercial and Procurement	Without any key documents in place [see action 5] the Commercial/Supplier arrangements need a step back. This is across the programme and Digital and Data. What can be assured to proceed, what is in debate in terms of delivery partner scope requirements, internal skills and capability to support programme and then the balance requiring contingent labour or delivery partner resource. What are the end state requirements/or principles that will guide procurement of Managed Service arrangements? Once the scope is understood and some principles and these are documented for shared clarity a review of the commercial approach should be undertaken	ASAP (in next month)	Commercial and supplier management is struggling to be aligned to programme and BAU needs.	A continued reality [or continued perception] of confusing arrangements for Data, Digital and programme with regard to supplier provision, accountability on deliverables will continue. Suppliers will be unable to deliver their best as a mismatch of expectations will lead to difficult and unnecessary conversations.
14.	Finance Risk Management	Finance planning. The programme including finance colleagues need to prepare for a range of scenarios depending on funding from DHLUC. How will the programme proactively plan rather than react and must go into major replanning again?	ASAP (in next month)	The programme has suffered long periods of uncertainty, adjustment and confusion following DHLUC funding allocations. A proactive approach to this, combined with building into the	A change in the funding could be destabilising again to the programme resulting in further uncertainty and more loss of time.

				Key Document production the information that enables an easier understanding of “break points” will enable the programme not to be as disabled in the future by any unexpected changes.	
15.	Planning and Scheduling Capability and Culture	There remains a very strong project/pillar perspective. The pivot now to programme is very late. People don’t understand the change in thinking needed. This needs a cultural and leadership thinking reboot within the programme. A charter, or away day workshop is required to bring together all teams and instil integrated thinking at their core.	ASAP (in next month)	It appears that the programme is struggling to make the transition from individual items to an integrated plan. Particularly given remote working, a face-to-face event is needed to help colleagues complete that journey and agree new ways of working, or cement agreed ways of working to make this transition and make an end to the previous model	The programme will continue to work in different ways, to different speeds and in different ways.
16.	Governance Risk Management Finance	A new way of framing accountability, objectives is needed to align all senior colleagues.	ASAP (in next month)	The business case is the business case and no change in that is possible.	No one believes in the business case, no one feels accountable for it. It is too old, signed before any current exec/directors were

				However, moving people on and helping them recognise something <i>achievable</i> in their minds is helpful.	in post. If nothing is done people will continue to feel disconnected and unaccountable for outcomes.
17.	Governance	A joint playback to Executive by the business leaders/SROs and programme leadership – this is what we are doing, all committed, all focus on this should be undertaken and then regularly repeated. This should be supported by the same playback occurring at programme boards first.	ASAP (in next month)	The focus on programme Evolve should be a team game. All the organisation at a macro level should be committed and the Executive team as a whole need to feel more engaged, more accountable and with collective “skin in the game”. Regular updates and support sessions are key to this.	Colleagues need to feel senior leaders are with them and sharing the pressures and successes and senior colleagues need to be able to be supportive but also have the opportunity to challenge and understand. Without this everyone is disconnected.
18.	Governance Risk Management	Change Control/Scope control put in place in Evolve but any related Digital, Data change plans/activity plans for 24/25. Ideally a Homes England Business Design Authority and Technical Design Authority is made more active/put in place.	ASAP (in next month)	Whilst a process for change control exists there is no evidence this is working well, nor are they any “anchor” documents to assess against. As soon as this work is complete from the Exam Question/Replan work and even during this in draft,	The programme will continue to drift with mixed messages on scope, confusing business stakeholders. Digital and Data plans for work will overlap, confuse, risk undermining programme activities and vice versa, resource and technical contention may emerge.

				the scope change control process needs rebooting, reasserting and enforcement as necessary.	
19.	Governance Performance	Clarity on the Evolve Release 1 impacted business owner(s) needs to be resolved. Who is accountability for assuring the business impact and receiving and accepting the Release in an integrated form?	ASAP (in next month)	During the interviews there was lots of uncertainty as to what the scope of Release 1.0 was, the impact of it in the business and who would be managing the business and technical support for it post go live. To make a go / no decision the SRO needs more assurance from both the programme, business receiving and Digital and Data receiving units that they are all joined up on the release, its cutover/go live impact, how it will be supported and the impact on end state resourcing beyond day 1.	Without this it may “go live” but no one feels they own any of the consequences and potentially a blame culture may emerge if things get difficult.

20.	Solution and Release Performance Capability and Culture	Agree an integrated service design approach as part of the core programme activity moving forward.	ASAP (in next month)	The approach to design is fragmented across business units and between different workstreams. This is leading to a lack of integrated understanding of the design needed to deliver new ways of working	The programme will continue to be unable to answer key questions about the impact of releasing functionality in the full organisational context of people, process, data, and other IT systems.
21.	Solution and Release	Determine how end to end business process design will be undertaken, and then how a business process catalogue is constructed and maintained as a key programme artefact.	ASAP (in next month)	The approach to business process design and having a catalogue that supports multiple business planning and programme artefacts is key.	The programme will continue to be unable to answer key questions about the scope of the programme, draw boundaries around what is in scope and out of scope as well as not have a key artefact for planning, resourcing and estimating.
22.	Risk Management Governance Capability and Culture	Formalise a Stage gate assurance process and consider the possibility of ongoing independent reviews/support for the SRO and programme Board	Ongoing	The commissioning of this review has highlighted that the ability of the programme and interested groups such as Digital, Data have not been able to effectively review the programme or provide confidence to the SRO that the programme is progressing in a	If the stage gate assurance continues to be ineffective then the programme will continue to be at risk of providing unintended false confidence to business stakeholders and the SRO resulting in ongoing surprises.

				planned, agreed and safe manner.	
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- **Note:** A final action that needs to be considered given feedback in interviews, but we were unable to determine the extent of the problem analysis /ongoing work/active plans in this space, is the analysis and then action to ensure that Digital and Data have the skills, capacity and capability to handle the work of Evolve. The receiving of completed releases, the ongoing continuous improvement and continuous development/support of these new ways of working/functionality/systems in business as usual and supporting the programme proactively needs the right support.



# **Programme Evolve – September 2024 Presentation of Findings Report Update**

Version : V0.4  
September 2024

Homes England Presentation of Findings .....	3
1. Executive Summary .....	3
2. Your Ask.....	4
3. Approach We Took .....	5
4. Summary of Findings and Recommendations .....	6
4.1. Findings and Recommendations .....	8
4.1.1. Findings .....	8
4.1.2. Recommendations .....	11
4.2. Review of Action Plan Progress .....	14
4.2.1. Updates on Recommendations and Actions.....	14
4.2.2. New Recommendations .....	24
4.3. Validating the Core Understanding of Senior Stakeholders .....	29
4.4. Appendix A: Interview Schedule .....	31
4.5. Appendix B: List of Materials Received and Reviewed .....	32
4.6. Appendix C: Spring 2024 Core Understanding of Senior Stakeholders.....	33

# Homes England Presentation of Findings

## 1. Executive Summary

This report has been compiled at the request of Homes England to provide the SRO with an updated view on the position of the Evolve programme. A baseline of the position of the programme was delivered in May 2024 in accordance with a specification shared in February 2024. The key ask, was to help Homes England understand whether the Evolve programme was setup for success to deliver a scope that would best enable the ambition of the business case to be delivered. It focused on answering the following two exam questions:

- 1) For the time and budget remaining does the scope give Homes England best value and achieve as close to the business case as possible?

AND

- 2) Against the scope, time and budget defined is Homes England set up for success to deliver this and therefore achieve the value identified?

At that time, in summary, the answer to both questions was negative. We (KPMG) did not find a defined agreed scope with a corresponding time and budget profile. We also did not find that the programme structures, culture and ways of working were setup for success, even if a fully budgeted plan with detailed scope, associated activity and resource plans had been in place.

In this review, we looked to evaluate progress against the actions from the previous report and highlight any new or emerging risks/issues.

We grouped the findings and recommendations into four areas in the previous report and have again used these categories; Governance, Engagement, Programme (we have removed Replan in this review). We found that one third of the actions have been closed, and over half of the outstanding actions are underway. The remaining actions primarily relate to culture and engagement activities and whilst critical, unsurprisingly have not been completed due to the dependency these have on the other outstanding actions.

It is evident that more foundational activity has taken place with the exit of the former SRO s. 40(2) alongside the programme leadership interviewed in the first review. It has taken time to find a new programme director and leadership team. This new team is providing more confidence to business stakeholders, and did provide more confidence in this review. The need to change the leadership and take a step back has taken time and this is putting significant pressure on the new team to 'change the aircraft mid-flight'. Whilst this review did not look at the current planning activities in detail, the team appeared to understand the critical path of design, securing appropriate resources, and undertaking appropriate procurement activity in parallel was key. Alongside this, delivery has continued in line with the milestones agreed in the revised plan e.g., Release 2 Investments (delivered), Release 2.1 Pipeline Assessment Service and Release 2.1 Land and Property Services system (both on track for 23<sup>rd</sup> September 2024).

The focus on these areas has meant that time has been squeezed for engagement and this can be seen from the action progress. Whilst the right steps appear to have been taken, the engagement work must not be delayed any further. There is a considerable amount of trust to

be earned with the business who have seen multiple evolutions of the Evolve programme and therefore some are understandably waiting to see if this iteration of scope, plan and team sticks.

A major new consideration for the programme, and tied to the challenge of engagement, is to describe how the programme is tied into the Data and Organisational Blueprint activity. Therefore, this review is recommending strongly that consideration is given to simplifying the portfolio from three programmes (Data, Evolve, OB) to one programme. Undertaking this change now, pre any further engagement would answer the calls from business colleagues for “simplicity” and “clarity” on what is happening in their area and reduce the complexity of dependencies that are beginning to emerge as the three programmes mature.

Overall, we assessed the programme's likelihood of success, the relative strength against agreed criteria, and the potential risks associated with individual projects. Our findings indicate that the programme continues to face significant challenges regarding timelines and resource quality. However a change in the leadership team, combined with a shift to integrated programme planning and the beginnings of a new mindset for engagement with the business provide confidence that the programme is turning itself around.

We (KPMG) found in this review that progress has been made and that the programme has moved the dial from “impossible to deliver” to “very challenging to deliver”. Overall, many interviewees felt the programme was “heading in the right direction” and the documentary evidence supports this.

## 2. Your Ask

The report should provide an update on the progress made against the set of recommendations and timebound actions for implementation that are required to improve the confidence rating of the programme.

It should enable us to understand whether progress is being made to set Evolve up for success as per the “exam questions” originally posed<sup>1</sup>.

It should highlight any ongoing risks identified in the original report and any new risks/issues and actions that should be considered.

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<sup>1</sup> For reference, the “exam questions” originally posed were:

1. For the time and budget remaining, are we undertaking a scope that will give Homes England best value and achieve as close to the business case as possible,  
AND

Against the scope, time and budget defined are we set up for success to deliver this and therefore achieve the value identified?

### 3. Approach We Took

We followed the same approach as taken in the original review, using a combination of interviews and evidence collection to come to our findings and recommendations.

The findings and recommendations were conducted based on the interview schedule and documents reviewed as detailed in Appendices A and B respectively. Our work was limited to what we saw and heard during the assessment. We asked a set of consistent questions to frame each interview to ensure a thorough understanding of the programme and its various aspects.

#### Outline of the approach:

- **Stakeholder Interviews:** Interviews conducted with Homes England identified key stakeholders. Where appropriate and, possible to do so, the same roles were interviewed for consistency.
- **Documentation Review:** Reviewed the documentation provided to validate/verify progress against actions.
- **Analysis:** Analysed interview and document data to identify common themes, patterns, pain points, and potential root causes of programme challenges.

#### Evidence:

- Interview transcripts and notes
- List of reviewed documentation (Detailed in Appendix B)

#### Limitations:

- Time and resource constraints limited the scope of the assessment.
- Findings based on information available at the time of the assessment.
- The EPMO and Organisational Blueprint programme were more prominent in the interview feedback, but we only took interview feedback about the strength, weaknesses, issues or risks they may have. We did not cross validate this.

## 4. Summary of Findings and Recommendations

As per the previous report we have grouped the findings and recommendations into three areas: Governance; Engagement; Programme.

Taken alongside the narrative interview feedback and review of documentation, the survey reflects a recognition that things are improving, whilst continuing to recognise the huge amount of work remaining to be done.

### Findings Summary

- The new leadership team is having a positive impact both in terms of delivery and in the perception of wider business colleagues.
- Overall progress remains behind the speed required to deliver to the milestones laid out, but the focus and approaches in place look to be the right ones. The timescales are aggressive and will require all elements –methodology, resourcing capacity and quality and culture and engagement to come together in the next three months as part of a high performing programme to provide a path to achieving the milestones in FY2025/2026.
- Resourcing and the quality of resource remains a significant concern if timescales are to be achieved and the quality of the programme is to continue to improve.
- The achievement of milestones will only be possible through a laser-like focus on scope control and acceptance of this across Service Directors and the broader business.
- Clarity on how the business achieves its outcomes and objectives is needed to ensure a cliff edge does not emerge once a minimum scope has been delivered through the programme.
- Key artefacts remain incomplete due to resource constraints though plans to regain this ground look sensible and are in progress.
- Business engagement remains a challenge, and more focus needs to be directed to this as soon as possible, alongside completion of the artefact work described above.
- The Data, Evolve and Organisational Blueprint programmes are a distraction to the business understanding and engaging in the change. Complex dependencies are coming to the surface now that the operating model design has progressed, and this could hamper progress and lead to divergent outcomes if the three aspects are not integrated.

### Recommendations Summary

- Several actions remain outstanding. The actions (or issues underlying them) remain valid. These actions should be completed in the next couple of months to increase success in hitting the milestones.
- Consideration should be given to the integration of the Organisational Blueprint, Data and Evolve programmes into one delivery vehicle.
- It is key to success that the language of delivery is tangible to stakeholders – i.e. transition states, capability maps, interim operating model plans need to be brought to life to engage senior business leaders in what it means for them. What do they need

to do to support, to deliver and what are they receiving and how will the programme help them.

- The design approach must incorporate consideration of how scope, delivery and benefits are tied together in a jointly signed off artefact between the programme and business leaders.
- The work to understand the scope of decommissioning is a key output of the design activity. As a result there should be, a “draft” scope and benefits document relating to decommissioning that is formulated and then iterated as the design stage progresses.

### **Action Review Summary**

In reviewing the actions and the evidence provided, we took a subjective opinion recognising that the “issue” identified was of primary importance, if the specific actions had not been taken, providing other actions/evidence dealt with the issue this was equally relevant and acceptable.

Engagement : 0 completed, 3 outstanding.

Governance : 3 completed, 3 outstanding.

Programme : 2 completed, 2 outstanding.

Replan : 2 completed, 7 outstanding.

**Total : 7 completed, 15 outstanding**

Of the 15 outstanding actions, this review was able to evidence that 10 are in progress with reasonably short timeframes (1-3 months) to complete.

## 4.1. Findings and Recommendations

### 4.1.1. Findings

We have grouped the key findings into three areas:

- **Governance**

- Formal governance is now occurring with appropriate regularity and representation. The governance meetings are beginning to evidence appropriate challenge and reflection on why issues are occurring and looking for improvements.
- Programme reports better reflect the state of programme. However, the most recent governance submissions continue to provide a reliance on the binary nature of documentation not its quality. i.e. is there a plan, is there a raid log. As the programme matures there needs to be consideration of the quality of artefacts.
- The programme leadership is now fully accountable to the SRO and EPMO in a way that was not evidenced previously. There remains work to do to enable the programme to be accountable to the broader business.
- The detail and visibility of release planning has improved but there remains much detail to be worked through.
- The Change Committee agreed to a revised plan and scope/cost in July. An internal case is being drafted for the programme to provide the anchor for scope/benefit definition. This is a work in progress and therefore it is not possible to comment on the achievability of an updated business case.
- The benefits work for the programme remains incomplete and this needs urgent attention to tie scope to benefits, and enable appropriate discussions during the programme lifecycle for when challenges emerge.
- There was evidence that change control procedures had improved and that the necessary artefacts to support impact assessment existed, A Business Design Authority and a Technical Business Authority are now up and running.
- A few interviewees articulated the need for further improvement in these processes to ensure that appropriate fully assessed recommendations came to Programme Board.
- The programme was able to articulate a plan and approach that will lead to the SRO being able to have confidence that the programme will progress in a planned, agreed and safe manner. The Business, Digital and Data Leads were not as confident. We saw evidence to support a conclusion that the programme is heading in the right direction in terms of general approach and plan, however, this work has not been shared with the Business, Digital and Data colleagues in a refined and clear way in order to build their confidence. This sharing of information now needs to occur rapidly.

- **Engagement**

- The programme has started to implement ways to understand how colleagues are feeling regarding either the programme, or in the wider business about the



work to date and the plan moving forward. This work needs to continue with more impetus in the next quarter.

- A high-level Plan on a Page exists which lays out the key milestones and scope buckets. Colleagues remain unclear as to whether the programme scope is achievable and what that scope is in any detail. Unlike the previous review the programme team recognised this challenge and had a plan to ensure that this clarity was achieved in the next 3 months through a Design phase producing artefacts such as a Service Blueprint and a Business Process Catalogue.
- The feedback from the baseline questions showed that the programme, Directors and Executive Directors were more aligned on their understanding of the current position of the programme.
- Whilst the review did not see any evidence of any portfolio integration of the 3 programmes outlined, this work has been commissioned and is a joint activity being led by the Organisational Blueprint Programme.
- Several colleagues commented on the overlap between programmes – Data, Evolve and Organisational Blueprint. The “full stack” impact of people, process, data and technology change is not a siloed experience for business areas and therefore managing them in separate chunks, whilst effective for “delivery” can lead to engagement challenges and possible “gaps” in the ways of working and transition set planning and execution for business areas.
- There are now the beginnings of a coherent set of artefacts covering scope, plan, benefits, finances, resources, and business impact that all stakeholders can align on and commit to. Again, whilst the work is not fully complete, unlike the previous review, the awareness of the need is recognised by the programme team, and the urgency with which it needs to be completed.
- Several interviewees commented on the low maturity and experience of senior colleagues relating to Change and Transformation activity, in some cases this was also linked to a lack of engagement, curiosity and ownership. Whilst this report cannot offer any views or recommendations on this without further investigation, a lack of engagement, constructive challenge and support from the whole Executive Leadership Team will be to the detriment of a successful programme. For clarity this finding excluded the SRO and s. 40(2) for whom there was positive feedback as to their experience and input.

- **Programme**

- There is a high-level programme plan in place. The logic of the plan holds together but there remains significant work to do to assure it. Of the three large areas: Finance, HR and Single Pipeline, Finance has the earliest tangible go-live. Based on our experience of Finance implementations, which have a comparable scope between organisations, the plan for Finance is very aggressive. Detailed scope will be key, adherence to a very “vanilla” implementation required, and high quality internal and external delivery partner sourcing will be needed to achieve these timescales. Whilst it is not possible to make similar comparisons for HR and Pipeline, as these are more varied from organisation to organisation, the same factors will be true to achieve aggressive milestones once the scope is identified.
- There is now a coherent approach to commercial and supplier management activity and the Digital and Procurement teams are engaged fully with the programme team.

- The finance and risk perspective on the programme is less detached than the previous review however, there remains work to fully integrate them into decision making and constructive feedback.
- There is less of a disconnect between the Business, Data and Digital business as usual areas and the programme. This is evidenced by the introduction of the Transition Board. However, this joint working remains at an early stage and there remains questions about the end state for Data and Digital as functions/capabilities.
- The programme leadership have shown in this review clarity of what an integrated programme looks like, and the steps needed to complete this journey from individual projects. This is slow work as it requires a culture shift as well as engagement with business colleagues who want to have “their” area be a focus of attention and sooner rather than later, whilst also wanting all “connections” with other business areas to be delivered along the journey. This tension needs focus to ensure ongoing engagement, maintaining promises to colleagues and to ensure broken or “worse than now” ways of working are not delivered. It appeared to some business leaders that the addition of the Organisational Blueprint work was further delaying Evolve with no apparent benefit and in fact was a further impediment to just getting stuff done.
- The approach to design is being formulated, but early indications of thinking from the programme leadership indicate that this will be a more integrated approach than previously. The new design approach delivering business blueprints is focused on defining upfront the business outcomes and business processes that will be in scope, allowing business colleagues to be able to understand more easily the scope. The extent of the change for the business areas will be linked to clear deliverables from the programme and the impact and the benefits will be jointly agreed between the business and Evolve.
- Some areas of work have stopped, and teams have been reorganised, or work slowed to recognise the dependencies on Organisational Blueprint as well as the importance of having the right baseline artefacts in place before work continues.
- The macro journey of Evolve is now clear for the Architecture team and therefore this shared understanding can be used to ensure disparate activities in BAU (business as usual) and other programmes will be aligned across standards, solutions, and transition states, Whilst the knowledge and understanding is embedded in individuals in the Architecture team, the formal governance groups and ways of working are still catching up to ensure that integrated and consistent application of the architecture design are not accidentally bypassed.
- Decommissioning remains an area without sufficient ownership, scope and delivery clarity or architectural certainty. This lack of certainty impacts the benefits realisation and operational business delivery, communications and engagement.
- The programme has suffered periods of uncertainty, adjustment and confusion following Ministry of Housing, Communities and Local Government funding allocations. This has hampered engagement, communication, planning, and programme delivery. This remains a risk and the planning work to mitigate this remains an outstanding action.

### 4.1.2. Recommendations

Where a recommendation aligned to findings in this report remains from the previous review, we have listed it in this section. More detailed commentary for these actions such as an updated timeframe is included in Section 4.2.1 *Updates on Recommendations and Actions* as well as any outstanding Actions still relevant but not directly linked to findings in this report.

The master list of outstanding actions is in Section 4.2.1 and the master list of new actions is in Section 4.2.2.

#### Governance

- *Outstanding Recommendations*
  - The SRO needs to identify the key individuals from the business who should be brought into the tent in terms of soft and formal communications and governance. A Service Director community needs to be built where ongoing programme to business dialogue, information sharing, RAID discussion and leaning in becomes the norm. This should sit outside the programme board governance.
  - A new way of framing accountability, objectives is needed to align all senior colleagues.
- *New Recommendations*
  - As the programme matures there needs to be consideration of the quality of artefacts. The governance groups should lead by example and interrogate selected documents as a group (critically included the business directors) to ensure that all views are being surfaced, ownership is clear and that the programme does not fall back into the trap of having documentation that no one believes in.
  - Strong consideration should be made for the integration of the three programmes; Data, Evolve and Organisational Blueprint. This would have significant stakeholder benefits in terms of clarity of delivery, resourcing, and engagement. The “full stack” impact of people, process, data, and technology change should be mapped out and transition state planning and execution for business areas should be clearly understood. This work should be discussed and evaluated with programme, business areas, Digital, Data and EPMO collectively and should surface topics such as scope, timings and compromises needed for the “greater good”.
  - That a “perceived” overlap between the Data programme, the Evolve programme and long-term skills, capability, architecture, and resourcing in Homes England is reviewed to ensure that all stakeholders are aligned on activities, resources, capability, and architecture. [Note: this is only relevant if the three programmes are not merged].

#### Engagement

- *Outstanding Recommendations*
  - A regular survey of the colleagues interviewed and then a fuller survey of programme and business colleagues are needed to check communications, and clarity on roles and responsibilities, scope and understanding is improving.

- Senior executives, not just the SRO, need to relaunch/reboot the programme in a visible way once a replan is completed. The intention would be to share the remaining scope, and to instil a belief in key colleagues on the programme and with colleagues who are key to programme from business.
  - A joint playback to Executives by the business leaders/SROs and programme leadership should be undertaken and then regularly repeated. This should be supported by the same playback occurring at programme boards first.
- *New Recommendations*
    - None

## **Programme**

- *Outstanding Recommendations*
  - The finance and risk business partner modelling needs review as to how these inputs work into the programme and how visibility of their work and the actions arising are managed.
  - All business areas need to commit to an expectation of business impact and resourcing to support Evolve, and confirm the priority requirements to deliver. In the case of Digital and Data, there needs to be a special focus on their responsibilities to support the programme, including what they want to do and what they need to do – design/assure architecture and how service transition and ongoing delivery will be managed post go-live.
  - An integrated service design approach needs to be agreed as part of the core programme activity moving forward.
  - It should be determined how end-to-end business process design will be undertaken, and then how a business process catalogue is constructed and maintained as a key programme artefact.
  - The programme needs a set of key artefacts to be able to communicate understanding and plan accordingly. This set of anchor artefacts needs to, at a minimum, include scope, benefits, plan, transitional ways of working assessment, resource plan and budget.
  - The programme must conduct a risk assessment including finance, risk, Digital, Data from the business to review the deployment/rollout approach and to understand the risk per release/or big bang and to consider if it would be acceptable to “get stuck” at any transition states and what mitigations could be.
  - Finance planning. The programme, including finance colleagues, needs to prepare for a range of scenarios depending on funding from the Ministry of Housing, Communities and Local Government. How will the programme proactively plan rather than react, and not go into major replanning again?
- *New Recommendations*
  - Each Business area must be reviewed for “fit” within the Integrated Programme and an understanding of the journey of that business area through transition states relating to Evolve [or the wider integrated delivery in the EPMO would be even better]. The aim of this is to ensure that Directors understand, broadly agree, and can explain to their own teams why they are part of the programme, the benefit to them and why a standalone project is not the answer.

- The design approach must incorporate consideration of how scope, delivery and benefits are tied together in a jointly signed off artefact such as a Service Blueprint. This should ensure that the programme, business and Digital and Data leaders are all “in it together”. The Service Blueprint should detail scope, the benefits derived from that scope, the benefits impact/value, and when scope will be delivered and the timings of benefit realisation”.
- That the work to understand the scope of decommissioning is a key output of the Design activity. This draft scope and benefits document should be created now and then iterated as the Design stage runs. This document should provide a clear “in/out” acceptance for Systems. i.e. the clarity that a system will be fully decommissioned or not. Benefits should only be allocated on this basis of whether a system is being fully decommissioned. For all systems irrespective of whether they are being fully decommissioned or only partially a functionality/business process level assessment should be detailed and signed off by BAU Digital/Data and business areas, to ensure that all colleagues are clear on the change resulting from programme delivery/decommissioning activities.

## 4.2. Review of Action Plan Progress

### 4.2.1. Updates on Recommendations and Actions

In this section, we lay out our assessment of progress made against the recommendations from our May 2024 report. For those items that remain open we have offered an updated view on progress.

#### Recommendations Closed

ID	Theme	Sub-Theme	Action	By When	Why Closed?	Recommendations
2	Governance	Formal	Programme governance needs to be reinstated and during the replan time, a parallel set of biweekly meetings are needed for R1.0 and the replan.	ASAP (in the next month)	* Programme governance is up and running and all interviews confirmed this, alongside evidence provided.	n/a
3	Replan	Plan	A plan for the replan phase needs to be drawn up to ensure the question of whether projects, suppliers and Homes England colleagues are working on valid activity that will be valuable irrespective of the outcomes of a replan.	ASAP (in the next month)	* A replan exercise was undertaken. * A series of changes have been undertaken by Evolve to refine the programme leadership and delivery teams to align to the future looking objectives and to ensure that the quality of resources matches the scale of the challenge in delivering the programme. * The programme "slowed down work on Pipeline activities to allow work on Organisational Blueprint	n/a

					(OB). Another example was to remove a new Document Management solution from the scope.	
4	Replan	Resources	Ideally a focused team needs to be separated from the R1.0 release to work on the replan. The SRO and s. 40(2) needs to agree a start/stop/continue existing “asks”/ “activities” to ensure that clarity on what is being asked for and delivered is available.	ASAP (in the next month)	* Clarity on what is needed and is being produced is evident from interviews. * Focus on ensuring that colleagues are working on the right activities has been discussed in interviews and the changes in some of the teams indicates that ongoing work to align the programme the new direction continues	n/a
13	Programme	Commercials /Procurement	Without any key documents in place [see action 5] the Commercial/Supplier arrangements need a step back. This is across the programme and Digital and Data. What can be assured to proceed, what is in debate in terms of delivery partner scope requirements, internal skills and capability to support programme and then the balance requiring contingent labour or delivery partner resource. What are the end state	ASAP (in next month)	* A step back on the procurement arrangements is underway and the thinking to ensure that commercial activity is linked coherently to delivery needs was evident in interviews. * s. 40(2) and team are now having regular supplier management meetings alongside programme colleagues to ensure that a joined-up approach to supplier is taking place.	n/a

			requirements/or principles that will guide procurement of Managed Service arrangements? Once the scope is understood and these are documented for shared clarity a review of the commercial approach should be undertaken			
15	Programme	Ways of Working	There remains a very strong project/pillar perspective. The pivot now to programme is very late. People don't understand the change in thinking needed. This needs a cultural and leadership thinking reboot within the programme. A charter, or away day workshop is required to bring together all teams and instil integrated thinking at their core.	ASAP (in the next month)	<ul style="list-style-type: none"> <li>* The introduction of a programme all hands day, and a more integrated programme leadership approach are signs that the programme is trying to reset the culture from projects to integrated programme.</li> <li>* Whilst work has not completed yet on decommissioning the identification of this work again shows maturity of the programme to consider its end-to-end impact.</li> </ul>	n/a
19	Governance	Formal	Clarity on the Evolve Release 1 impacted business owner(s) needs to be resolved. Who is accountability for assuring the business impact and receiving and accepting the Release in an integrated form?	ASAP (in the next month)	<ul style="list-style-type: none"> <li>* The impact of R1.0 was relatively low due to the number of users impacted.</li> <li>* No major issues emerged from R1.0 however the interviews from Digital and Programme recognised that moving forward the integrated need for business impact and release management is critical. A "transition" Board has</li> </ul>	n/a



					been established between Digital and the programme to help prepare, communicate, and evaluate the transition journey from inception to delivery and handover.	
22	Governance	Process	Formalise a Stage gate assurance process and consider the possibility of ongoing independent reviews/support for the SRO and programme Board	Ongoing	* A combination of Government Digital Services (GDS) stage gate reviews, EPMO checks and Business Readiness checks run by the Programme but signed off by the impacted business directors are now in place.	n/a

### Recommendations Remaining Open

ID	Theme	Sub-Theme	Action	By When	Review Comments	Updated Recommendation
1	Replan	Plan	The Programme needs a replan phase to be agreed for beyond Release 1.0 which brings together senior programme leaders and directors in the business areas impacted to produce key programme artefacts to be able to answer the Exam Questions listed earlier in the document.	ASAP (in the next month)	<ul style="list-style-type: none"> <li>* A replan exercise has been undertaken.</li> <li>* The replan exercise resulted in a pause of activity beyond R1.</li> <li>* The replan did produce new or revised versions of required artefacts however the new Service Design approach activity will provide the input to cement a baseline for the programme to work to.</li> <li>* The documents reviewed start to provide more confidence in answering the Exam Questions, but are insufficient in detail, confidence or certainty to provide</li> </ul>	* The artefacts do not yet fully exist as a baseline form. This needs to be completed by end of Oct 2024 to setup 2025 successfully.

					the initial baseline required. * The replan documents have not been fully completed, or are not at a stage where they can be shared other than in draft form with heavy context	
5	Replan	Key Artefacts	<p>The programme needs a set of key artefacts to be able to communicate understanding and plan accordingly:</p> <ul style="list-style-type: none"> <li>· a short visual release journey map</li> <li>· a release plan highlighting each transition state.</li> <li>· define the scope in terms meaningful to business and technical communities.</li> <li>· what the benefits/value is in financial and non-financial terms</li> <li>· the impacted business colleagues and customer experiences in a [stop, start, continue guide].</li> <li>· The as-is and to-be architecture changes at each transition point</li> </ul>	End of June 2024	<p>* The review was able to identify that these artefacts are underway but that more work is being undertaken.</p> <p>* The dependency with the OB programme is driving some uncertainty and delays in the production of artefacts, however an integrated view in the longer run will aid clarity to programme, EPMO and org in the longer run</p>	* The artefacts do not yet fully exist as a baseline form. This needs to be completed by end of Oct 2024 to setup 2025 successfully
6	Replan	Key Artefacts	The programme must conduct a risk assessment including	ASAP (in the next month)	* This action is too early to evaluate given the ongoing work with the baseline artefacts and	* The action remains outstanding and needs to be complete by end of oct 24

			finance, risk, Digital, Data from the business to review the deployment/rollout approach and to understand the risk per release/or big bang and to consider if it would be acceptable to “get stuck” at any transition states and what mitigations could be.		that the Transition Board only recently setup.	
7	Governance	Formal	The SRO needs to identify the key individuals from the business who need to be brought into the tent in terms of soft and formal communications and governance. A <i>Service Director</i> community needs to be built where ongoing programme to business dialogue, information sharing, RAID discussion and <i>leaning in</i> becomes the norm. This sits outside the programme board governance	ASAP (in next month)	* A monthly meeting has been put in place starting in October 2024. * It is likely this may need to be more frequent. The meetings provide a forum for discussion, but the journey is as much about building shared learning, experiences and a collective feel for accountability within this group and therefore keeping this group informed, consulted and involved week to week is key.	* The action remains outstanding and needs to be complete by end of October 2024.
8	Engagement	Culture	A regular survey of the colleagues interviewed and then a fuller survey of programme and business colleagues is needed to check communications	End of May 2024	* No survey is in place, but a regular monthly team day was up and running.	* Whilst a survey has not been undertaken, other elements such as programme awayday are in place. Regular engagement and meetings will need to be put in place and

			and clarity on roles and responsibilities, scope and understanding is improving. Even asking the same standard questions in the interviews to the colleagues in a month's time would be helpful to manage direction of travel.			other methods to assess feedback – i.e. Meet and Greet with s. 40(2) with a rotation of staff on the programme, possibly business directors/lead SMEs as well.
9	Replan	Plan	As part of the replan process, the key supplier, Digital, Data and programme architects need to be brought together to <i>find a way</i> to deliver the optimal value path.	End of May 2024	<ul style="list-style-type: none"> <li>* The architect community has been aligned internally and as part of the supplier management consideration on how to manage suppliers to support the internal architecture function has been undertaken.</li> <li>* The Business Design Authority and Technical Design Authority are now up and running.</li> <li>* There remains a misalignment about the work of the Data programme, the data workstream on the Evolve programme and the end state Data setup.</li> </ul>	* That a "perceived" overlap between the Data programme, the Evolve programme and long-term skills, capability, architecture, and resourcing in Homes England is reviewed to ensure that all stakeholders are aligned on activities, resources, capability, and architecture.
10	Programme	Ways of Working	The finance and risk business partner modelling needs review as to how these inputs work into the programme and how visibility of their work and the actions arising are managed.	End of May 2024	<ul style="list-style-type: none"> <li>* The involvement of the risk partner was more positive than the previous review.</li> <li>* The finance team have not been able to be part of detailed financial conversations due to lack of maturity of the baseline artefacts.</li> </ul>	* As the baseline artefacts are completed in the next month the finance and risk business partners need to be fully incorporated into programme management and governance decision making.

11	Programme	Ways of Working	All business areas need to commit to an expectation of business impact and resourcing to support Evolve and to confirm the priority requirements to deliver. In the case of Digital and Data there needs to be a special focus on its responsibilities to support the programme, how it wants to/ needs to – design/assure architecture and how service transition and ongoing delivery will be managed post go live.	End of June 2024	<ul style="list-style-type: none"> <li>* All stakeholders reported an improvement in the relationship between Digital, Data and the Programme both formally through governance and informally through personal relationships.</li> <li>* There is work underway via the Organisational Blueprint (OB) to devise a future operating model for Digital Services in the organisation.</li> </ul>	* This work is an opportunity to identify key services/skills that Homes England will require post-Evolve and ensure that provision for these are made - either through full in-house capability or through a managed service arrangement.
12	Engagement	Culture	Senior executives, not just the SRO, need to relaunch/reboot programme in a visible way once a replan is done, to share remaining scope and to instil a belief in key colleagues on the programme and with colleagues who are key to programme from the business.	Mid-June 2024	<ul style="list-style-type: none"> <li>* The interviews provided feedback that the SRO was very visible, and that people had confidence in the SRO and the broader change leadership and EPMO function.</li> <li>* There was not evidence that the collective action across senior leaders is established however this would also be dependent on the baseline artefacts existing.</li> </ul>	* The action remains outstanding and needs to be complete by end of dec 24
14	Replan	Plan	Finance planning. The programme including finance colleagues need to prepare for a range of scenarios depending on	ASAP (in the next month)	<ul style="list-style-type: none"> <li>* The programme is finalising its financial position in detail.</li> <li>* The detailed work that the programme and finance business partner would need to undertake</li> </ul>	* Ensure that this activity is planned into schedules for Q4 24/25 and that inputs required are ready.

			funding from DHLUC. How will the programme proactively plan rather than react and must go into major replanning again?		in a sensitivity analysis is not needed for the annual DHLUC submission not due till FY Q4 2024/2025.	
16	Governance	Key Artefacts	A new way of framing accountability, objectives is needed to align all senior colleagues.	ASAP (in the next month)	* Work is underway to create a new business case across the OB, Evolve and Data programmes and this should frame the new accountability.	* The action remains outstanding and needs to be complete by end of dec 24
17	Engagement	Culture	A joint playback to Executive by the business leaders/SROs and programme leadership – this is what we are doing, all committed, all focus on this should be undertaken and then regularly repeated. This should be supported by the same playback occurring at programme boards first.	ASAP (in the next month)	* This has not yet occurred.	* The action remains outstanding and needs to be complete by end of dec 24
18	Governance	Process	Change Control/Scope control put in place in Evolve and any related Digital, Data change plans/activity plans for 24/25. Ideally a Homes England Business Design Authority and Technical Design Authority is made more active/put in place.	ASAP (in the next month)	* Feedback from interviews indicated that the change control processes are becoming more mature. This is due to more mature processes from the EPMD and also more effective preparation by the programme team. * The feedback indicated that more work was needed to ensure that the formal governance was the catchall for the right	* That the maturity of this process is monitored by Programme Board/EPMD and that any additional interventions are instructed before Jan 2025.

					sequencing of change assessments. However, the fact that good relationships and communications between teams was alerting colleagues to issues is a step forward from the last review and should be seen as a positive alongside the maturity of the formal governance processes.	
20	Replan	Approach	Agree an integrated service design approach as part of the core programme activity moving forward.	ASAP (in the next month)	<p>* A new colleague has been recruited to the programme with experience of Service Design and leading a Service Design process.</p> <p>* The programme has identified an approach for Service Design for the Finance, HR, and application processing areas such as those covered by Pipeline activity. This approach is now in the process of being setup with recruitment of colleagues and establishing a baseline of artefacts to determine detailed scope and benefits.</p>	* The action remains outstanding and needs to be complete by end of October 2024
21	Replan	Approach	Determine how end to end business process design will be undertaken, and then how a business process catalogue is constructed and maintained as a key programme artefact.	ASAP (in the next month)	<p>* The programme has identified an approach to Service Design that will provide a business process catalogue for the different business areas.</p> <p>* The approach is familiar to the programme leadership and familiar to the new incoming Service Architect.</p>	* The action remains outstanding and needs to be complete by end of October 2024

#### 4.2.2. New Recommendations

ID	Theme	Sub-Theme	Action	By When	Why?	Risk if not undertaken?
23	Governance		As the programme matures there needs to be consideration of the quality of artefacts. The governance groups should lead by example and interrogate selected documents as a group (critically included the business directors) to ensure that all views are being surfaced, ownership is clear and that the programme does not fall back into the trap of having documentation that no one believes in.	Ongoing	Formal governance is now occurring with appropriate regularity and representation. The governance meetings are beginning to evidence appropriate challenge and reflection on why issues are occurring and looking for improvements. Programme reports better reflect the state of programme. However, the most recent governance submissions continue to provide a reliance on the binary nature of documentation not its quality. i.e. is there a plan, is there a RAID log. As the programme matures there needs to be consideration of the quality of artefacts.	Programme falls back into the trap of having documentation that no one believes in.
24	Governance		Strong consideration should be made for the integration of the three programmes – Data, Evolve and Organisational Blueprint. This would have significant stakeholder benefits in terms of clarity of delivery, resourcing, and engagement. The “full stack” impact of people, process, data,	By end of December 2024	Several colleagues commented on the overlap between programmes – Data, Evolve and Organisational Blueprint. The “full stack” impact of people, process, data, and technology change is not a siloed experience for business areas and therefore managing them in separate chunks, whilst effective for “delivery” can lead to engagement challenges and possible “gaps” in	Lack of clarity from business as to what programme is delivering what leading to lack of buy-in. Failure to manage complex dependencies results in broken ways of working. The three programmes diverge and the EPMO is unable to link the activities in order to manage impacts, spend and benefits appropriately.



			<p>and technology change should be mapped out and transition set planning and execution for business areas should be clearly understood. This work must involve business directors with decisions around scope, timings and compromises needed for the “greater good” to be discussed and evaluated with programme, business areas, Digital, Data and EPMO collectively.</p>		<p>the ways of working and transition set planning and execution for business areas.</p> <p>Whilst the review did not see any evidence of any integrated programme view of the business impact of the programme plan and the consequences for business areas, performance and colleagues, this work has been commissioned and is a joint activity with the Organisational Blueprint programme.</p> <p>There is less of a disconnect between the business, Data and Digital and the programme. This is evidenced by the introduction of the Transition Board. However this joint working remains at an early stage and there remains questions about the overlap of the Data programme, the Data elements of the Evolve programme and the end state for “Data” as a function/capability. In addition, the engagement between Digital and the programme remains in its infancy and will need to consider the</p>	
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					impact of the Organisational Blueprint outputs for Digital.	
25	Governance		That a "perceived" overlap between the Data programme, the Evolve programme and long-term skills, capability, architecture, and resourcing in Homes England is reviewed to ensure that all stakeholders are aligned on activities, resources, capability, and architecture. [Note: this is only relevant if the three programmes are not merged].	By end of December 2024	There is less of a disconnect between the business, Data and Digital and the programme. This is evidenced by the introduction of the Transition Board. However this joint working remains at an early stage and there remains questions about the overlap of the Data programme, the Data elements of the Evolve programme and the end state for "Data" as a function/capability. In addition, the engagement between Digital and the programme remains in its infancy and will need to consider the impact of the Organisational Blueprint outputs for Digital.	The Data programme and Evolve programme deliver different technology solutions, using different standards and ways of working that mean that the BAU support is more complex and possibly not aligned d to current or future BAU standards. Additional skillsets are then needed, and higher BAU costs arise from a diversity of end state skills, technologies and standards, In addition, during the programme(s) lifecycle there is a shortage of skills in BAU to support different approaches/solutions.
26	Programme		Each Business Area must be reviewed for "fit" within the Integrated Programme and an understanding of the journey of that business area through transition states relating to Evolve [or the wider integrated delivery in the EPMO would be even better]. The aim of this is to ensure that Directors understand, broadly agree and can explain to	By end of December 2024	The programme leadership have shown in this review clarity of what an integrated programme looks like, and the steps needed to complete this journey from individual projects. This is slow work as this requires a culture shift as well as engagement with business colleagues who want to have "their" area be a focus of attention and sooner rather than later, whilst also wanting all "connections" with other business areas to be delivered along the journey. This tension needs focus	Business leaders will continue to be disengaged, and a higher risk of "missing" elements will be carried into BAU. Business leaders will not "lean in" and an "us" and "them" behaviour will emerge during, and post go lives.

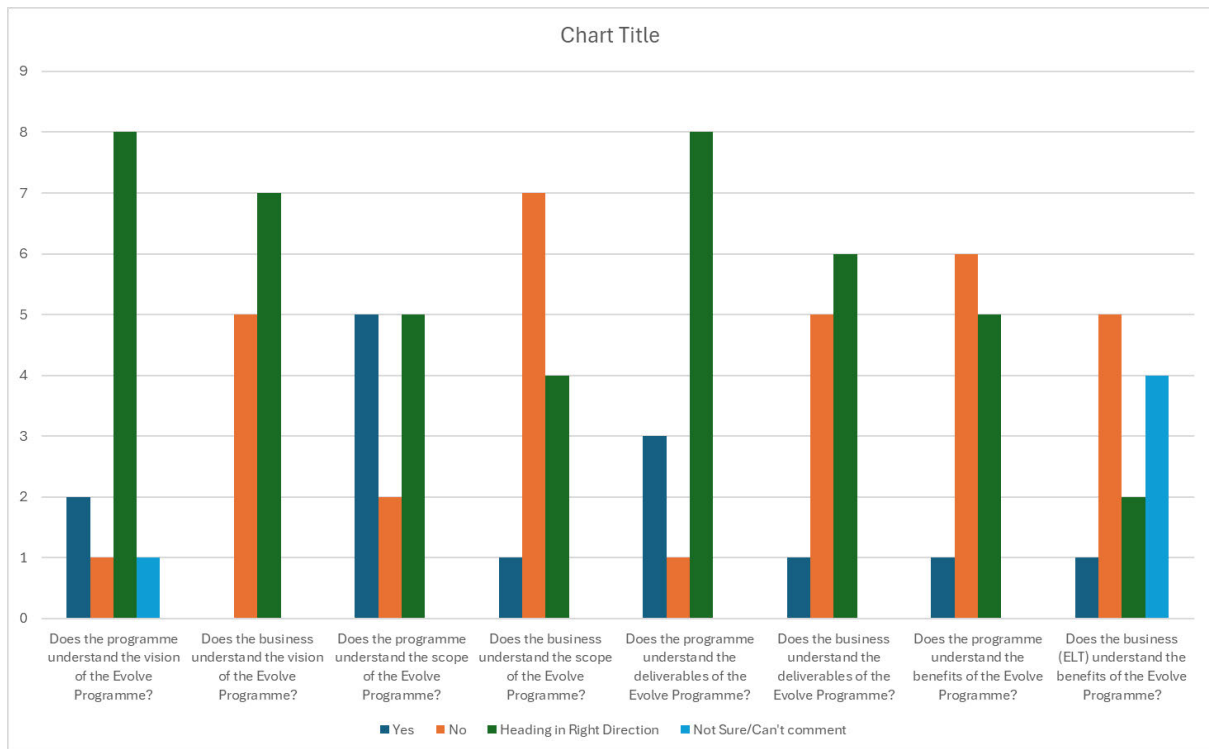
			their own teams why they are part of the programme, the benefit to them and why a standalone project is not the answer.		to ensure ongoing engagement, maintaining promises to colleagues and to ensure broken or “worse than now” ways of working are not delivered. For some business leaders the overlay of Organisational Blueprint with Evolve had no apparent benefit and in fact was a further impediment to just getting stuff done.	
27	Programme		The design approach must incorporate consideration of how scope, delivery and benefits are tied together in a jointly signed off artefact such as a Service Blueprint to ensure that programme, business and Digital and Data leaders are all “in it together” as to the detail of what scope, will deliver which benefits, for what benefit impact/value, and when in terms of delivery and benefit realisation”.	By end of October 2024	The programme leadership have shown in this review clarity of what an integrated programme looks like and the steps needed to complete this journey from individual projects. This is slow work as this requires a culture shift as well as engagement with business colleagues who want to have “their” area be a focus of attention and sooner rather than later, whilst also wanting all “connections” with other business areas to be delivered along the journey. This tension needs focus to ensure ongoing engagement, maintaining promises to colleagues and to ensure broken or “worse than now” ways of working are not delivered. For some business leaders the overlay of Organisational Blueprint with Evolve had no apparent benefit and in fact was a	<p>Business leaders will continue to be disengaged, and a higher risk of "missing" elements will be carried into BAU. Business leaders will not "lean in" and an "us" and "them" behaviour will emerge during and post go lives.</p> <p>The programme will be unable to articulate the value it is has delivered, there will be risk of disagreement with business leaders as to the value and the possibility of missing elements that are critical only being identified later in the programme lifecycle or post go live.</p>

					further impediment to just getting stuff done.	
28	Programme		That the work to understand the scope of decommissioning is a key output of the Design activity. That a “draft” scope and benefits document is formulated to be iterated as the Design stage runs. That there is a clear “in/out” acceptance for Systems. i.e. the clarity that a system will be fully decommissioned or not is always maintained and benefits are only allocated on this basis AND a functionality/business process level assessment is available to be shared with BAU Digital/Data and business areas to aid their understanding and to enable them to validate the programme assumptions.	By end of December 2024	Decommissioning remains an area without sufficient ownership, scope and delivery clarity or architectural certainty. This lack of certainty impacts the benefits realisation and operational business delivery and communications and engagement.	That there is no clarity and confusion on the systems being decommissioned. That the detail of functionality is not agreed, and different stakeholders and the programme and Digital have different understanding resulting in missed benefits, orphaned functionality and broken business processes.

### 4.3. Validating the Core Understanding of Senior Stakeholders

As part of this Review, we repeated the exercise of interviewing stakeholders from Homes England to assess their level of understanding of the programme's vision, scope, deliverables, and benefits. To continue assessment against the original baseline understanding, we put forward close-ended standard questions to all interviewees. These questions were designed to elicit specific information about the programme and its objectives, and to gauge the level of understanding among stakeholders. By asking the same questions to each interviewee, we were able to compare their responses and identify any gaps in knowledge or understanding. This approach helped us to gain a comprehensive understanding of the stakeholders' perspectives and informed our assessment of the programme's overall effectiveness. To enable differentiation from the original review we provided an option of “heading in the right direction”.

	Question	Yes	Heading in the Right Direction	No	Don't' Know / Not Sure
1	Does the <i>programme</i> understand the <b>vision</b> of the Evolve Programme?	2	1	8	1
2	Does the <i>business</i> understand the <b>vision</b> of the Evolve Programme?	0	5	7	0
3	Does the <i>programme</i> understand the <b>scope</b> of the Evolve Programme?	5	2	5	0
4	Does the <i>business</i> understand the <b>scope</b> of the Evolve Programme?	1	7	4	0
5	Does the <i>programme</i> understand the <b>deliverables</b> of the Evolve Programme?	3	1	8	0
6	Does the <i>business</i> understand the <b>deliverables</b> of the Evolve Programme?	1	5	6	0
7	Does the <i>programme</i> understand the <b>benefits</b> of the Evolve Programme?	1	6	5	0
8	Does the <i>business (ELT)</i> understand the <b>benefits</b> of the Evolve Programme?	1	5	2	4



*Chart 1. Showing results of the interview Q&A on stakeholders' perspective of the Evolve Programme.*

Overall, the “Yes” results were similar to the original survey. The introduction of the “Heading in the Right Direction” answer provided for movement from “No” responses, and interviewees still felt able to say “No” as seen in the results notably in both the Benefit responses.

The original survey can be found in Appendix C.

#### 4.4. Appendix A: Interview Schedule

30 <sup>th</sup> August 2024-12 <sup>th</sup> September 2024: Fact-finding		
Name	Job Role	Date of Interview
s. 40(2)	s. 40(2)	30/08/2024
	s. 40(2)	30/08/2024
	s. 40(2)	10/09/2024
	s. 40(2)	10/09/2024
	s. 40(2)	03/09/2024
	s. 40(2)	03/09/2024
	s. 40(2)	12/09/2024
	s. 40(2)	12/09/2024
Kristy Shaw	Chief Operating Officer	30/08/2024
s. 40(2)	s. 40(2)	02/09/2024
	s. 40(2)	03/09/2024
	s. 40(2)	03/09/2024
	s. 40(2)	04/09/2024

2 potential business interviewees were unavailable due to leave and/or other commitments.

## 4.5. Appendix B: List of Materials Received and Reviewed

Category	Name of Document Received
Programme Governance	Evolve Programme Dashboard
Architecture	Evolve Architecture Overview
Architecture	Evolve Transition States
Architecture	Evolve Release 2 High Level E2E Service v2.0
Architecture	Release 1 High Level E2E Servicev0.20
Architecture	Homes England_F&O Solution Blueprint v0.7 no comments version 12042024 (1)
Architecture	FMS - E2E Loans and Grants Architecture Design
Architecture	HE FMS Solution Design Document v1.0-2-2
Architecture	Homes England HR Options Discovery Report
Architecture	Land Solution Design Document
Architecture	TDA Solution Approval - Land and Property Service - Phase 1-2
Programme Governance	2024-08-22 Prog Board pack
Programme Governance	CCN001 Milestone Update Sep 24
Programme Governance	Consolidated Plan.mpp
Programme Governance	Evolve POAP Milestone Dependency - 05 09
Programme Governance	Evolve POAP Milestone Dependency - 12 091
Business Change	Business Change Plan 2
Business Change	Draft content for LPS launch
Business Change	Draft content for the Pipeline Assessment Service
Business Change	Investment Comms and Engagement
Business Change	R3 Comms and Engagement
Stage Gate Assurance	Change Readiness Checklist Template.xlsx
Stage Gate Assurance	Evolve Checklist - Stage Gate Tracker - Release 2.xlsx
Stage Gate Assurance	Stage Gates Process _v1.1.pptx



## 4.6. Appendix C: Spring 2024 Core Understanding of Senior Stakeholders

	Question	Yes	No
1	Does the <i>programme</i> understand the <b>vision</b> of the Evolve Programme?	4	8
2	Does the <i>business</i> understand the <b>vision</b> of the Evolve Programme?	0	12
3	Does the <i>programme</i> understand the <b>scope</b> of the Evolve Programme?	4	8
4	Does the <i>business</i> understand the <b>scope</b> of the Evolve Programme?	0	12
5	Does the <i>programme</i> understand the <b>deliverables</b> of the Evolve Programme?	4	8
6	Does the <i>business</i> understand the <b>deliverables</b> of the Evolve Programme?	0	12
7	Does the <i>programme</i> understand the <b>benefits</b> of the Evolve Programme?	4	8
8	Does the <i>business (ELT)</i> understand the <b>benefits</b> of the Evolve Programme?	2	10

*Note: that there were two interviews where the responses captured did not directly answer the above questions, and hence excluded from the tally.*

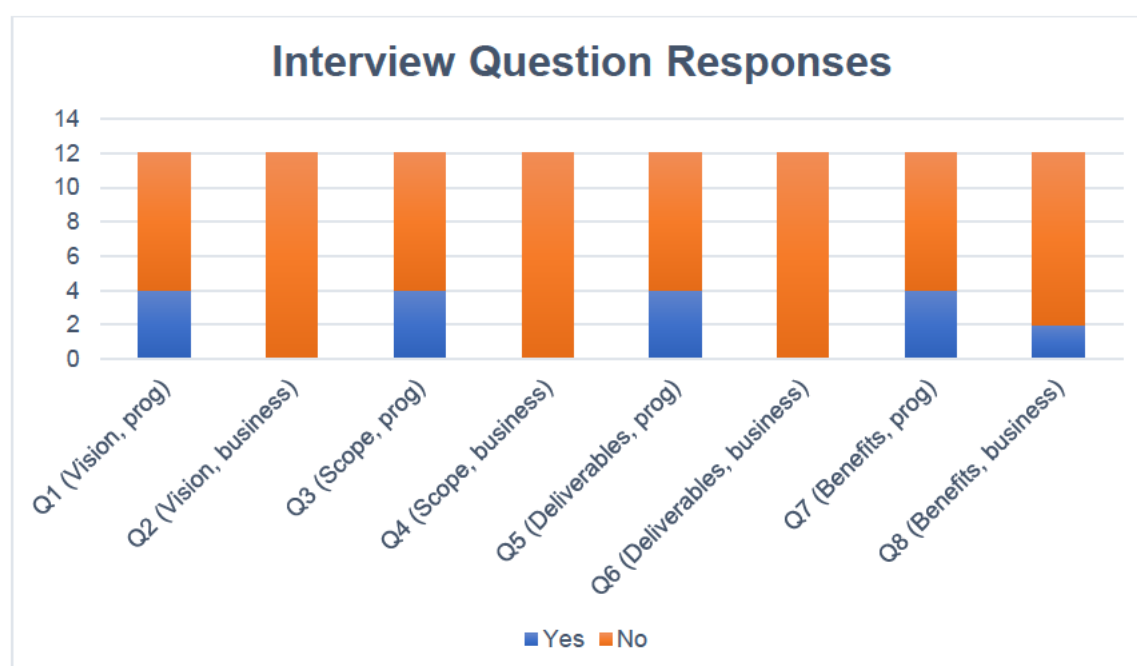


Chart 1. Showing results of the interview Q&A on stakeholders' perspective of the Evolve Programme.